



STUDENT TRAINING GUIDE

CONNECT HCM 9.2 Fundamentals

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CONNECT HCM 9.2 Fundamentals

Student Training Guide

Student Name

Instructor(s) Name(s)

Class Date

Go Live Date

Judicial Information Systems
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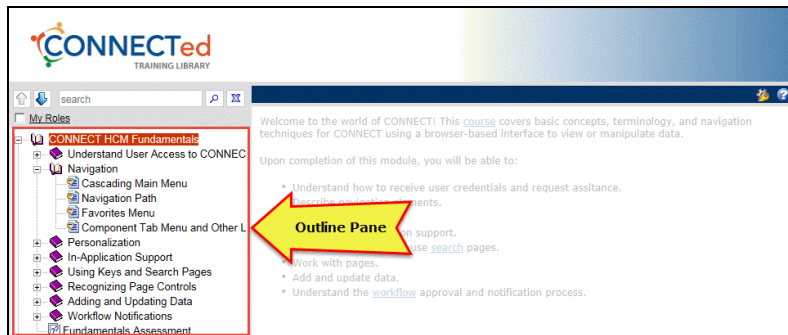
CONNECT HCM 9.2 Fundamentals

CONNECTed Instructions

Locating and Launching CONNECTed Training Content

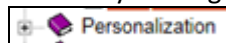
The CONNECTed player is the central area from which you can find and view training content in the form of conceptual information and transactional simulations, with links to other information such as Job Aids, Student Guides, Business Process Maps, and so on. The simulations can be launched in several different modes so you can choose the playback styles that best meet your needs. The last section at the bottom of this page (Play Mode Toolbar) provides a description of each mode that is available from the player.

CONNECTed Player Interface Overview

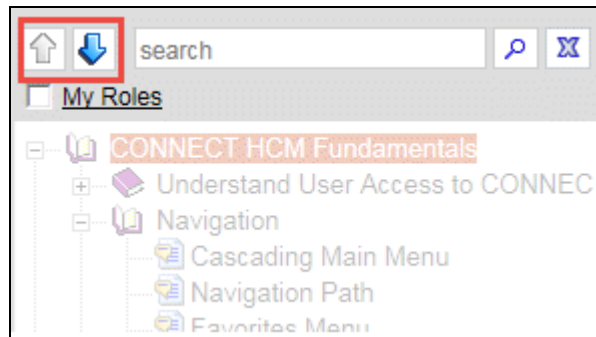


The **Outline Pane** (above) displays the training content on the left side of the player. The outline displays concepts, sections and topics. Sections (purple book icons) organize training topics into logical groupings. Topics (listed within the sections) represent the training simulations you will launch and navigate through to learn the material. There are several methods available to help you find the appropriate content as follows:

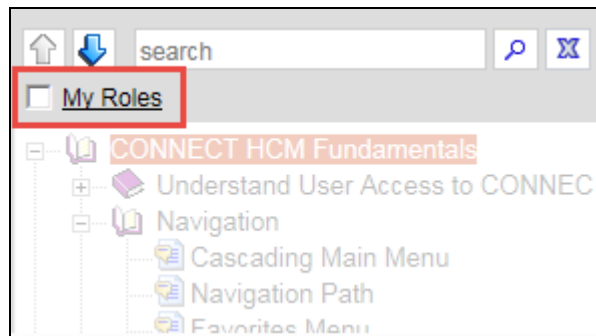
1. **Navigation Controls** (arrows) allow you to navigate up and down the outline. As you use these buttons to navigate, the outline expands as necessary to display the next document or documents depending on the document type. You can also navigate the outline by clicking on the plus (+) sign next to the desired section (book icon)





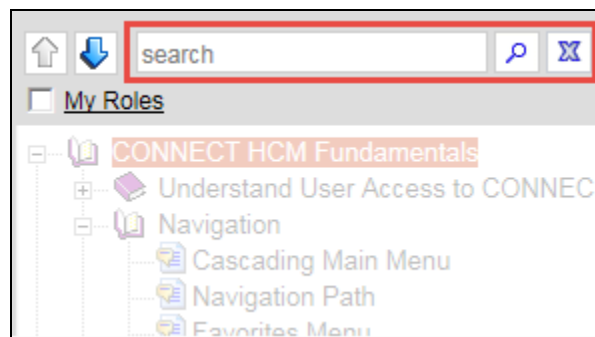
to view all related topics.



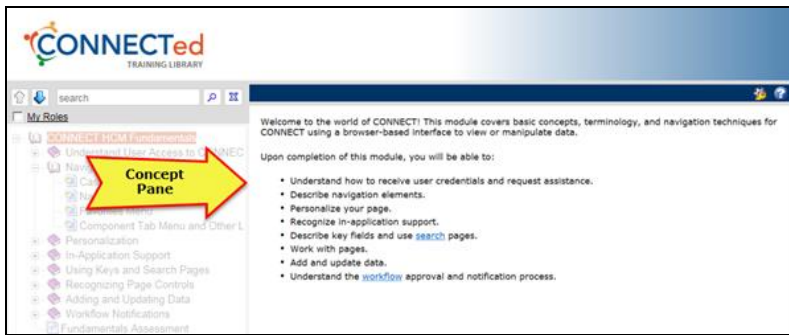
2. **My Roles** allows you to personalize the content outline to show only those topics that apply to a specific role. Click the My Roles link to select the desired role and filter the content.






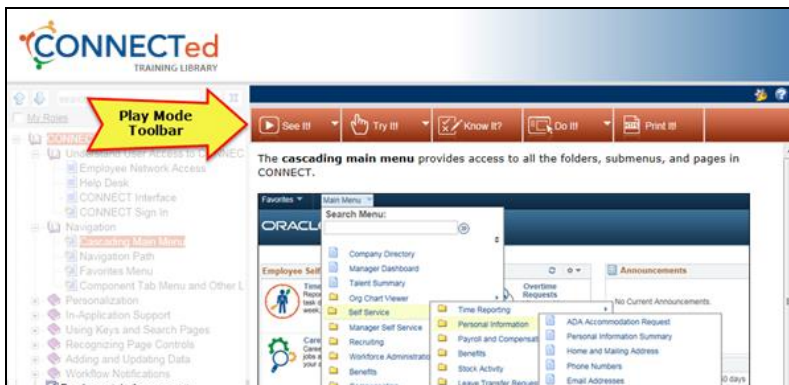
3. The **Search textbox** allows you to locate content quickly instead of navigating the outline. The player performs a full-text search, including any predefined keywords, to locate all content with the indicated word. Click the magnifying glass icon  to search and the  icon to delete the keyword.



The **Concept Pane** (to the right of the outline) displays the conceptual information about the document that is selected in the outline.



Some topics are informational only  which means the simulation modes are not available. You simply read the information displayed in the Concept pane. The other topics that are demonstrated/simulated  utilize the play mode toolbar. The **Play Mode Toolbar** appears above the concept pane when a topic  is selected in the outline.

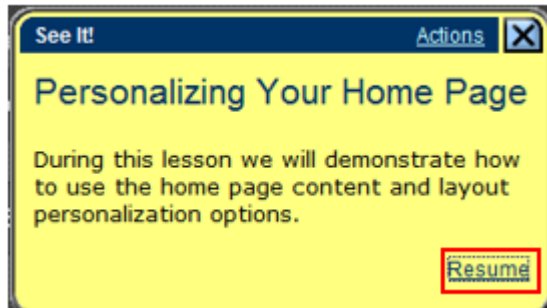
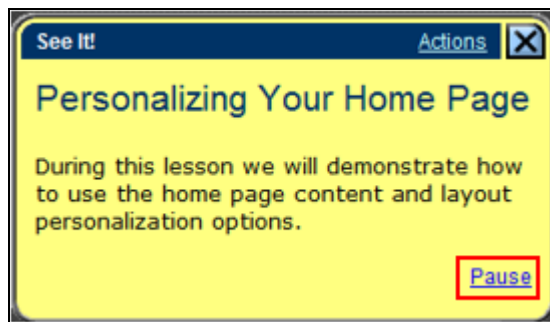


- **See It!** mode enables you to learn about the selected topic by displaying an animated demonstration of a task being completed.
- **Try It!** mode allows you to perform the selected task in a simulated environment.
- **Know It!** mode tests your ability to perform the selected task in a simulated environment.
- **Do It!** mode guides you as you perform the selected task in the live application.
- **Print It!** mode allows you to display an HTML job aid.

Navigating Through the Content

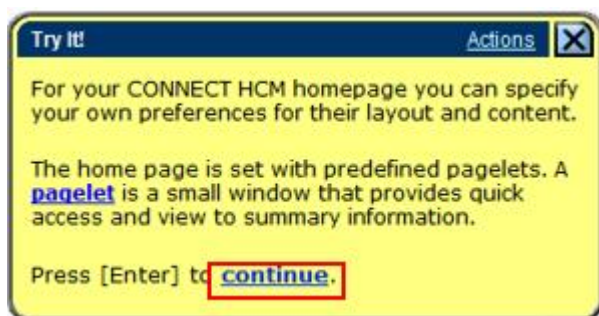
When you click the desired mode from the Play Mode Toolbar, the simulation opens in your browser.

When using "See It", the simulation will automatically begin and transition to the next step every 5 seconds. If you need additional time on a step, you can pause the simulation by clicking the Pause link in the yellow bubble. Once you pause, click Resume to continue the simulation.

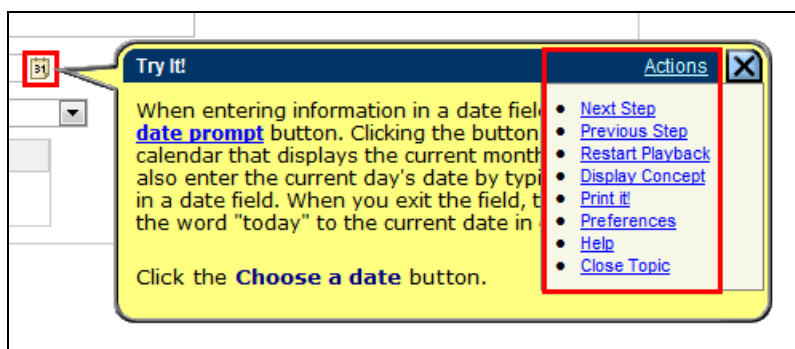


When using "Try It", you must complete the instructions in the bubble before the simulation will advance to the next step. You might be asked to click the "Start" link, click a button, enter data into a field, or click the "Continue" link in order to complete the step and move to the next one.





To navigate between screens in the topic, use the **Actions** menu within the information bubbles. The options are:
Next Step, Previous Step, Restart Playback, Display Concept, Print it!, Preferences, Help, Close Topic



Glossary of Terms

The player contains a built in Glossary that identifies words within the content and will link those words to their definition. Those words are displayed in blue and are underlined throughout the training content.

Feedback:

Provide your feedback or questions via email to: connect@mdcourts.gov
 (<mailto:connect@mdcourts.gov>) to help us improve training.

CONNECT HCM Fundamentals

Welcome to the world of CONNECT! This module covers basic concepts, terminology, and navigation techniques for CONNECT using a web browser to view or enter data.

Upon completion of this module, you will be able to:

- Understand how to receive user credentials and request assistance.
- Describe navigation elements.
- Personalize your page.
- Recognize in-application support.
- Describe key fields and use search pages.
- Work with pages.
- Add and update data.
- Understand the workflow approval and notification process.

Understand User Access to CONNECT

The Understand User Access to CONNECT lesson introduces you to how access to CONNECT is granted, demonstrates how to sign in to CONNECT, how to request assistance with training and technical support, and an interface definition map.

Upon completion of this lesson, you will be able to:

- Understand Employee Network Access.
- Sign into CONNECT.
- Contact the Help Desk.
- Understand the Interface.

Employee Network Access

Employee Network Access

During your onboarding process your information was gathered and provided to Judicial Information System (JIS), to setup an Active Directory account to provide you with a Judiciary email. CONNECT will leverage this account information to provide you access to the system. Using the first part of your email (firstname.lastname) and email password you will be able to log into the CONNECT system.

If you do not have access or encounter any issues with access to the system you will need to contact the Help Desk.

<http://courtnet/connect/> (<http://courtnet/connect/>)

Help Desk

Contact the Help Desk

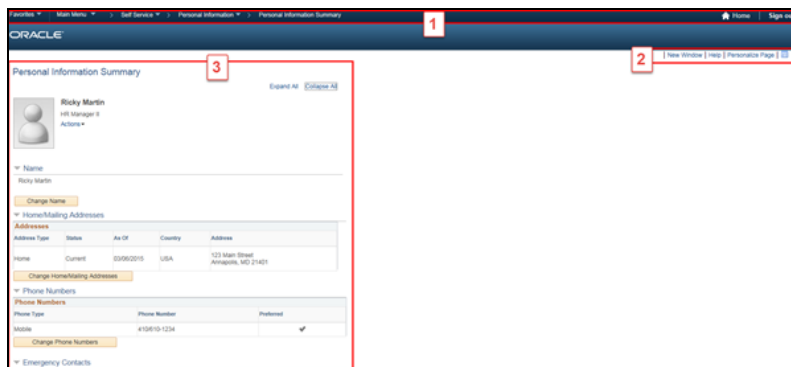
- Call: **410-260-1114**
- Email: **helpdesk@mdcourts.gov** (<mailto:helpdesk@mdcourts.gov>)

When you call the Help Desk they will open a help desk ticket and include all the information you provide. Make sure to be as detailed as possible with your issue so they can resolve it in a timely manner.

CONNECT Interface

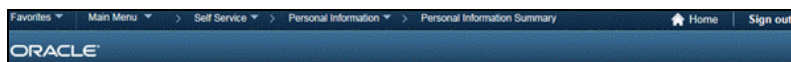
The **CONNECT Interface** is composed of three basic areas:

1. Header navigation
2. Links to manage component pages
3. The Component Page area



The **Header Navigation** contains:

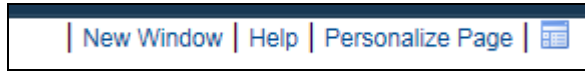
- Favorites Menu
- Main Menu
- Navigation Path (when on a component page)
- Home Link
- Sign Out Link



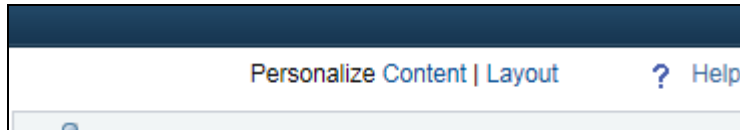
The **links to manage component pages** allow you to:

- open the component in a new window
- access the help content for that component

- personalize the individual component page



- Note: when on the **homepage** or **dashboards** the options will change to Personalize Content and Layout and also include the Help link

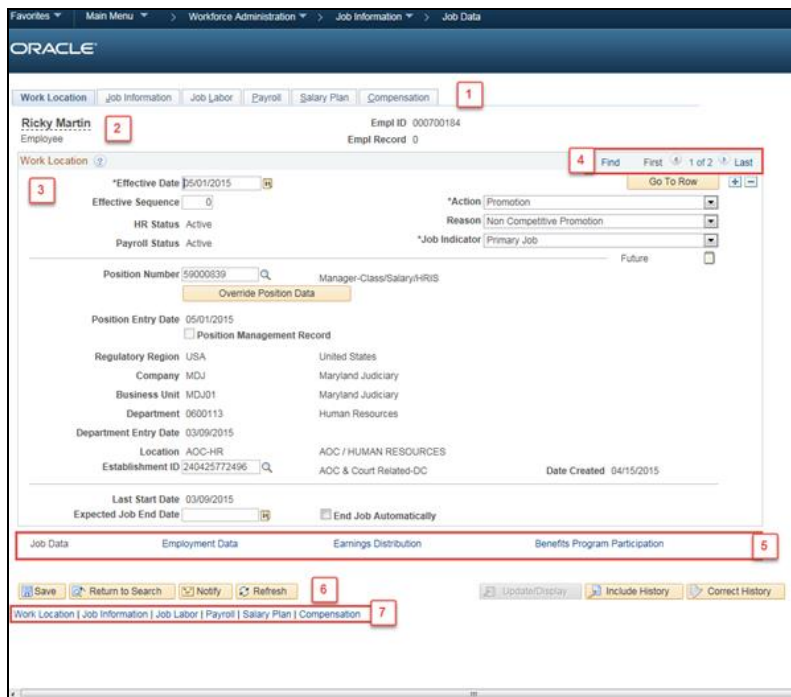


The **component page** is where you will do your transactions. These are the pages that allow you to:

- search the database
- enter/edit/view/save data

Below is an example of a **component page interface**:

1. Component Navigation Tabs - allows you to navigate to additional sections of a component.
2. Specific Record details - such as employee name, title, employee ID, and record number.
3. Component section (example below is Work Location) and all the associated data fields.
4. Navigation links (First link, Previous Arrow, Next Arrow, Last link) for records associated to the component section.
5. Links to other components related to the current component.
6. Action buttons (if a button is greyed out it is inactive).
7. Footer links for quick access from the bottom of the page to the component sections (same links as the tab menu).



CONNECT Sign In

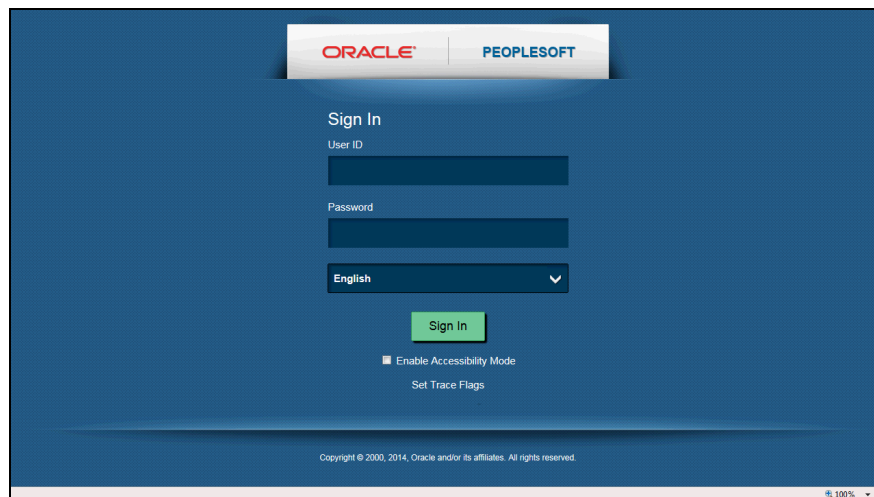
Signing into CONNECT is just like opening a secured page on a website on the Internet. You enter the URL (Uniform Resource Locator) in your browser window's address box to open the site. When the site opens, you type in your **User ID** and **Password** to access the secured areas.




Procedure

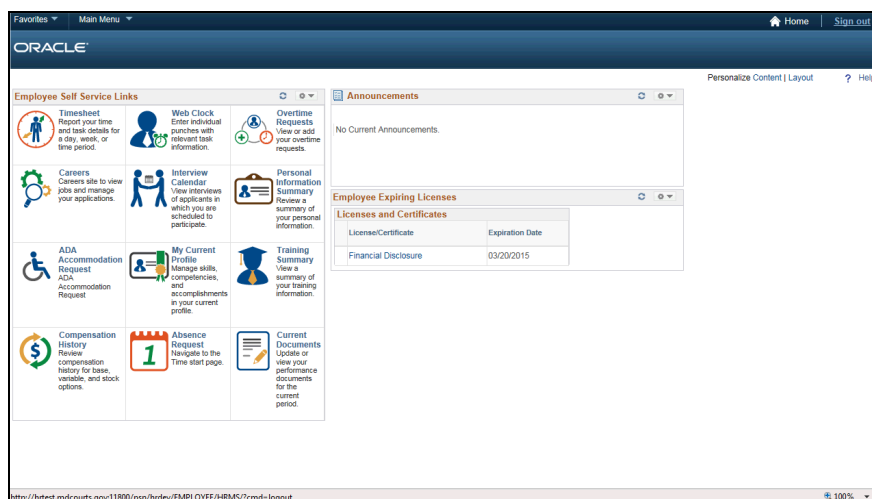
During this topic you will be guided through the process of signing into the CONNECT system.

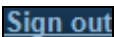
Step	Action	Notes
1.	<p>When you open your default browser's window and type in the URL for CONNECT or select the bookmark for the page in which you would like to work, the Sign In page appears.</p> <p>You use this page to select the language in which you want your transaction pages to appear and to sign in to the application.</p>	



Step	Action	Notes
2.	<p>CONNECT's Internet Architecture structure provides "single signon" access, which allows you to work in multiple CONNECT applications and databases without having to sign out and sign in again.</p> <p>Both the User ID and Password fields are case sensitive.</p> <p>Click in the User ID field.</p>	
3.	Enter " ricky.martin " into the User ID field.	
4.	Click in the Password field.	

Step	Action	Notes
5.	Once you have typed in the user ID, you can type in the password. Notice that for security purposes, when you type the password, it will be shown with asterisks. Also note that passwords are case sensitive. Enter " welcome1 " into the Password field.	
6.	Click the Sign In button. 	
7.	Your HCM Home Page will load the defaulted pagelets with summary information from various sources within the system. This page may vary per user. This is the Home page for Enterprise Human Capital Management. For security purposes, your CONNECT system logs you out of your application after a period of inactivity. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire.	



Step	Action	Notes
8.	To exit CONNECT securely you should always sign out after completing your transaction. Click the Sign out link. 	

Step	Action	Notes
9.	You have completed the process of signing into the CONNECT system. End of Procedure.	

Navigation

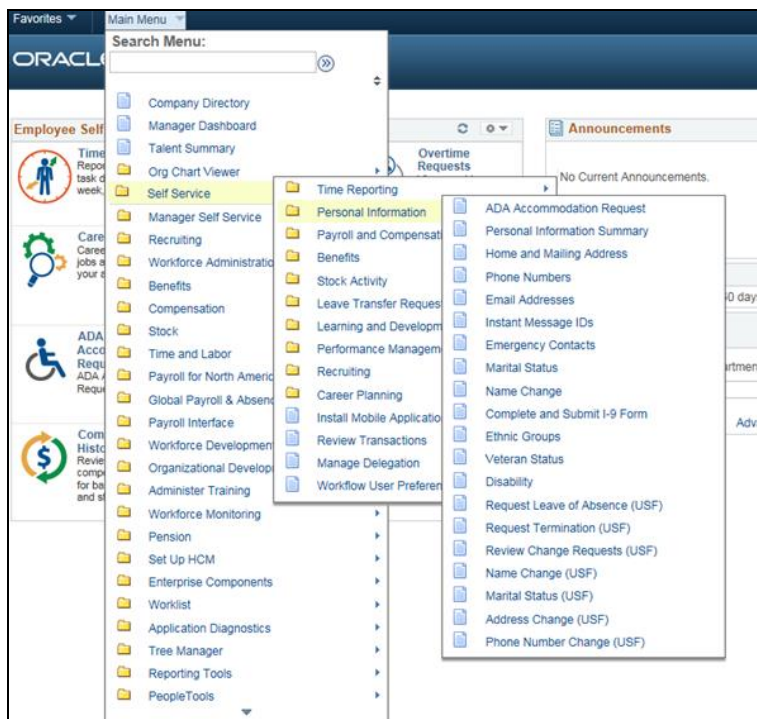
The **Navigation** section includes topics demonstrating some of the basic **navigation elements** common to CONNECT.

The navigation elements discussed in this topic include:

- Cascading Main Menu
- Navigation Path
- Favorites Menu
- Component Tabs and Other Links

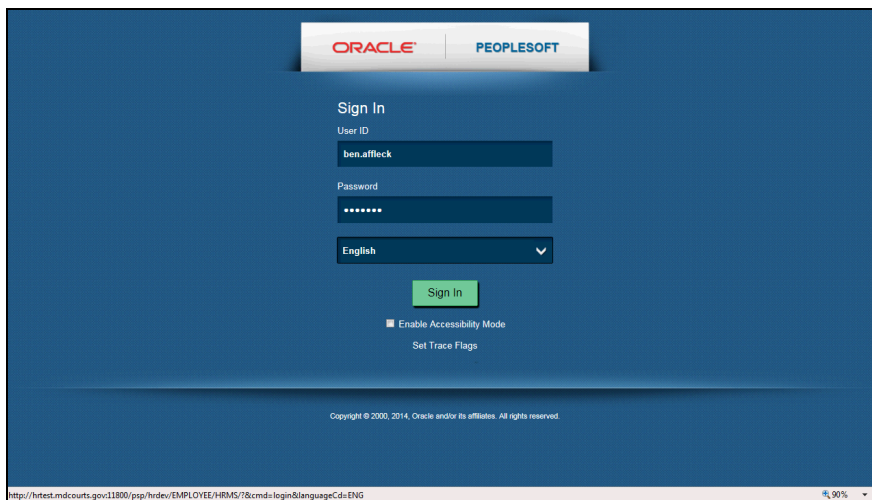
Cascading Main Menu

The **cascading main menu** provides access to all the folders, submenus, and pages in CONNECT.

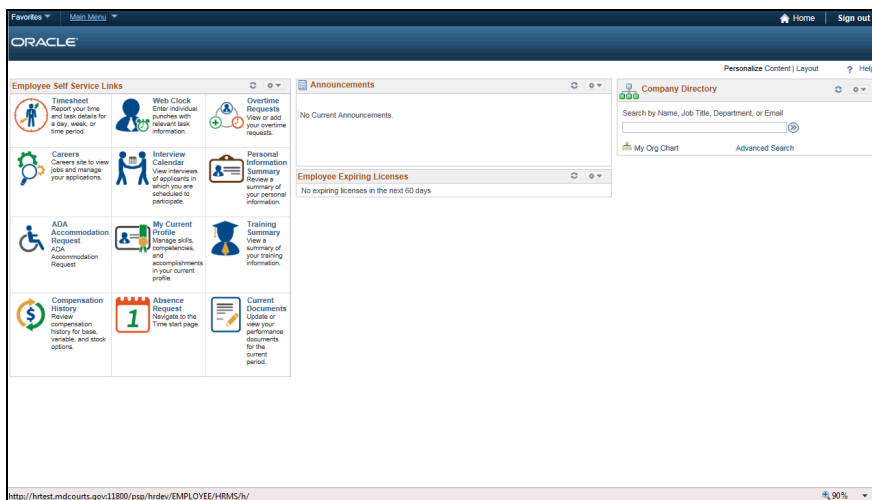







Procedure



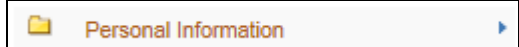

During this topic you will be guided through the CONNECT system's cascading main menu.



Step	Action	Notes
1.	Click the Sign In button. 	



Step	Action	Notes
2.	<p>Mostly, you will navigate to components and pages in the application by using the cascading main menu.</p> <p>To navigate to components and pages, expand the Main Menu. For this exercise let's navigate to the Job Data component.</p> <p>Click the Main Menu button.</p> 	
3.	<p>CONNECT uses cascading menus to display a menu structure composed of a hierarchy of folders and content references that you can use to navigate to various application pages.</p> <p>Menu items will vary based on user role security to provide you access to the components you will need to work with.</p>	
4.	<p>User security will determine the items available in the menu and therefore some users will have more menu items than others.</p> <p>If your menu includes more items than it can display an arrow at the bottom will allow you to navigate.</p> <p>To access additional menu items place your mouse over or click the Bottom arrow.</p> <p>Click the Scroll Down button.</p> 	
5.	<p>Click the Scroll Down button again to continue viewing the menu items.</p> 	
6.	<p>Click the Scroll Up button.</p> 	
7.	<p>You also have the ability to sort your menu items alphabetically in ascending and descending order.</p> <p>Click the Sort Menu button.</p> 	

Step	Action	Notes
8.	<p>Notice how the menu is now sorted in alphabetical and ascending order.</p> <p>Also, notice how the sort button is now pointing up.</p> <p>Click the Sort Menu button.</p> 	
9.	<p>The cascading menus approach is the recommended way of getting around in your CONNECT application. To use the cascading menus, you click each folder leading to the desired destination. Then, when you reach the destination page, click on that link.</p> <p>Click the Self Service menu.</p> 	
10.	<p>Click the Personal Information menu.</p> 	
11.	<p>Notice that yellow highlighting on the cascaded menus indicates your navigation trail to this point.</p> <p>Click the Personal Information Summary menu.</p> 	
12.	<p>Once you land on the page, the page title is displayed at the top.</p> <p>NOTE: some pages may have a different name than the menu item.</p>	
13.	<p>Also, notice the Navigation Path (also known as breadcrumbs) is available at the top.</p>	

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CONNECT HCM 9.2 Fundamentals



Personal Information Summary

Ben Affleck
Administrative Clerk I
Actions

Name
Ben Affleck
Change Name

Home/Mailing Addresses
Addresses

Address Type	Status	As Of	Country	Address
Home	Current	01/01/2014	USA	123 Main St Annapolis, MD 21204

Change Home/Mailing Addresses

Phone Numbers
Phone Numbers

Phone Type	Phone Number	Preferred
Business	410263-1273	<input checked="" type="checkbox"/>

Change Phone Numbers

Emergency Contacts
Emergency Contacts

Name	Relationship to Employee	Primary Contact
------	--------------------------	-----------------

http://test.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/h/Tab:DEFAULT

Step	Action	Notes
14.	Click the Home link. 	

Employee Self Service Links

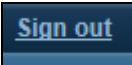
- Timesheet: Report your time and task details for a day, week, or time period.
- Web Clock: Enter individual punches with relevant task information.
- Interview: View interviews of applicants in which you are scheduled to participate.
- ADA Accommodation Request: ADA Accommodation Request.
- My Current Profile: Change skills, competencies, and accomplishments in your current profile.
- Training Summary: View a summary of your training information.
- Compensation History: Review compensation history for base, variable, and stock options.
- Absence Request: Request time off.
- Current Documents: Update or view your performance documents for the current period.

Announcements
No Current Announcements.

Employee Expiring Licenses
No expiring licenses in the next 60 days.

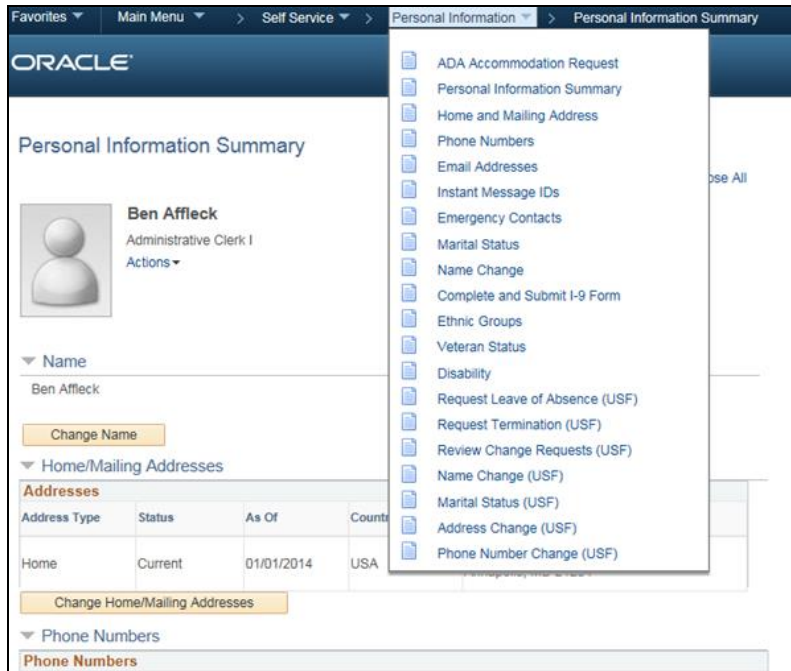
Company Directory
Search by Name, Job Title, Department, or Email
My Org Chart
Advanced Search

http://test.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/7cmds/logout

Step	Action	Notes
15.	Click the Sign out link. 	
16.	You have successfully used some of the Cascading Main Menu items to move through CONNECT browser-based application interface. End of Procedure.	

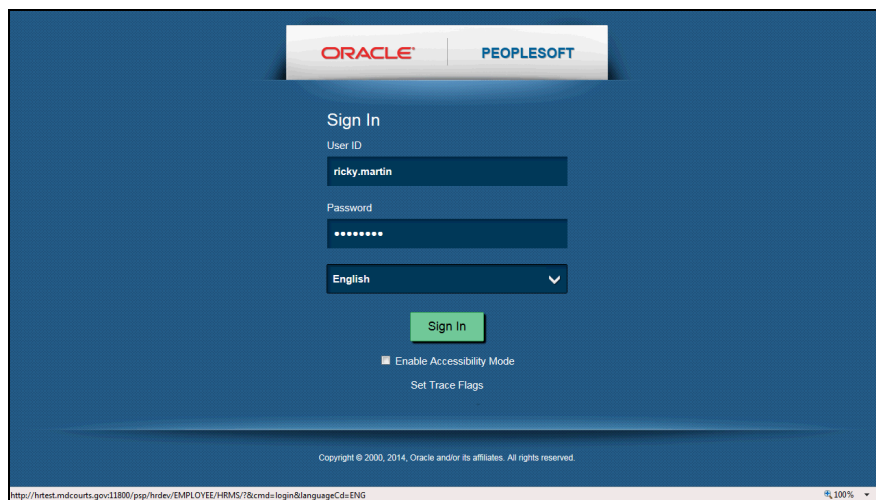
Navigation Path

The **navigation path** (also known as breadcrumbs) is located at the top of each page. It provides quick access to other component pages from the current component page without having to start at the Main Menu.



Procedure

During this topic you will learn how the navigation path can help you navigate quickly between a component's sections.

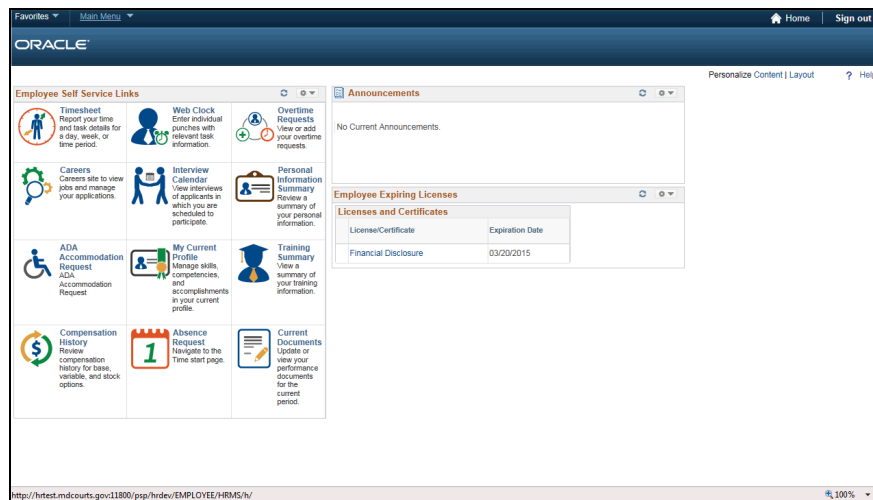






TRAINING GUIDE

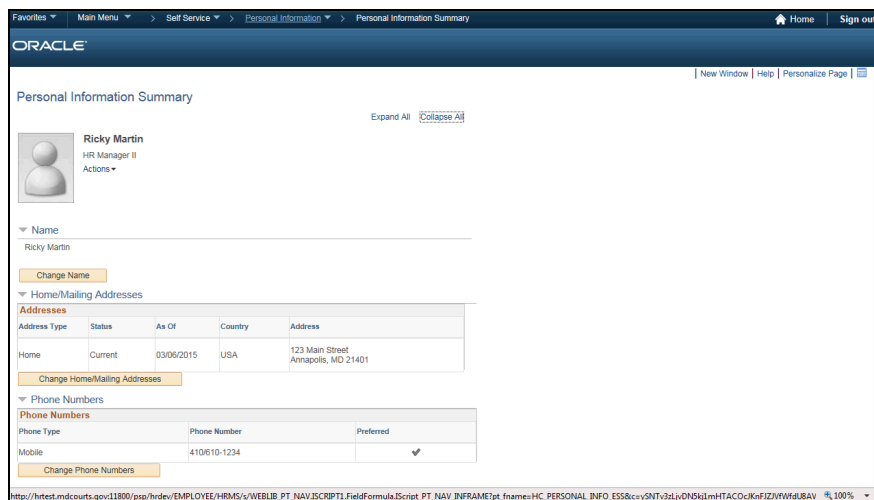
CONNECT HCM 9.2 Fundamentals


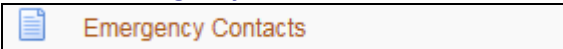


Step	Action	Notes
1.	Click the Sign In button. 	



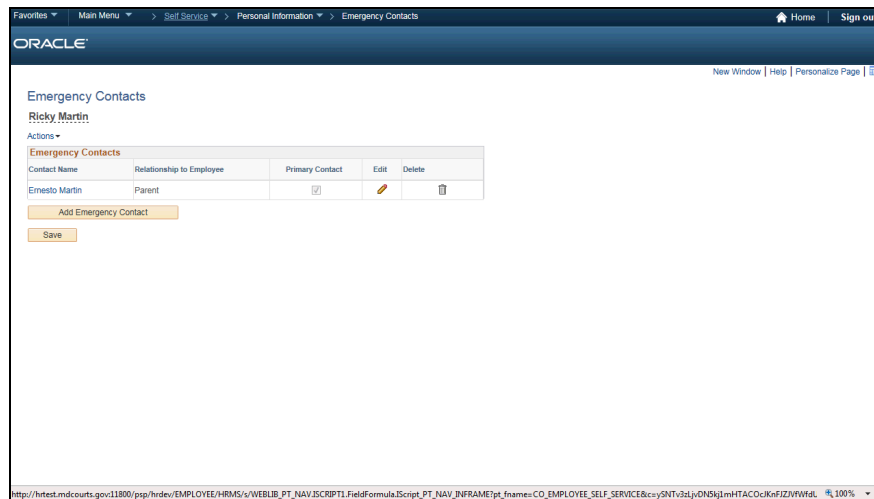
Step	Action	Notes
2.	For this topic we will navigate to the Personal Information Summary Page within the Self-Service component. Click the Main Menu button. 	
3.	Click the Self Service menu. 	
4.	Click the Personal Information menu. 	
5.	Click the Personal Information Summary menu. 	
6.	The cascading main menu allows you to navigate from a main folder to a subfolder to a page. Within the main and sub folders we have access to other areas of the main component, which in this example is the Self-Service component for Employee transactions. If you need to navigate to a page within the subfolder Personal Information, then the quickest way is to use the navigation path (also known as breadcrumbs).	

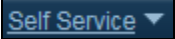

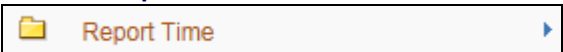





Step	Action	Notes
7.	<p>Component folders containing additional sub folders or pages will display a down pointing arrow next to the link in the navigation path. In this example we want to access the Emergency Contacts page.</p> <p>Click the Personal Information button.</p> 	
8.	<p>As you can see the navigation path link to Personal Information provides you with quick access to all related pages under that sub folder.</p> <p>Click the Emergency Contacts menu.</p> 	

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Step	Action	Notes
9.	<p>Unlike Personal Information, the Self-Service folder not only includes pages, it also contains sub-folders to other components.</p> <p>Click the Self Service button.</p> 	
10.	<p>Notice how in this list of options we have access to various component sub folders and at the bottom some pages. From here we have quick access to, for example, the Time Reporting component which contains the Reporting Time folder which in contains the Timesheet page.</p> <p>Click the Time Reporting menu.</p> 	
11.	<p>Click the Report Time menu.</p> 	
12.	<p>Click the Timesheet menu.</p> 	
13.	<p>Notice how the navigation path is updated as we navigate to our final page.</p>	

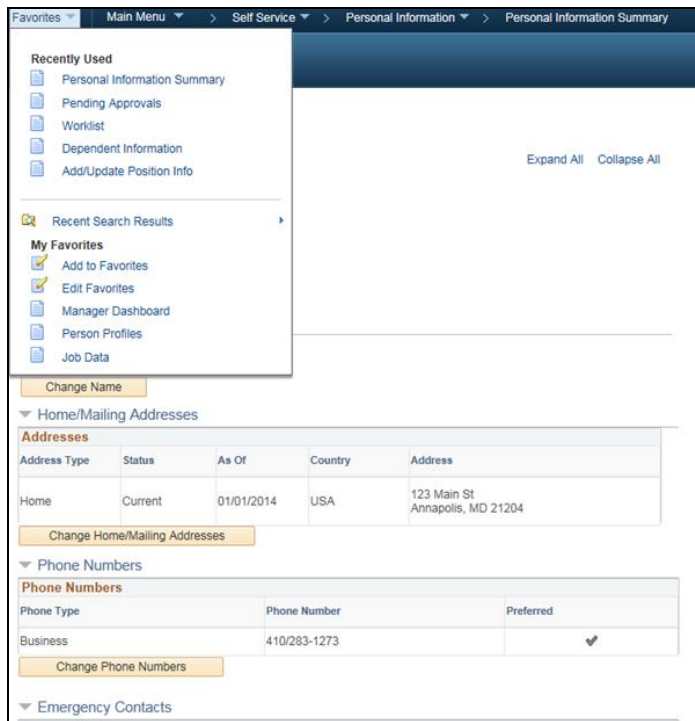
Step	Action	Notes
14.	Click the Main Menu button. 	
15.	You will always have the Main Menu available to navigate to other business areas of CONNECT.	
16.	You have completed reviewing the Navigation Path topic. Click the Home link. 	

Step	Action	Notes
17.	Click the Sign out link. 	

Step	Action	Notes
18.	You have completed the navigation path topic. End of Procedure.	

Favorites Menu

CONNECT includes a **Favorites menu** for you to bookmark your commonly used pages and quickly access them without navigating through the folder structure of the main menu.



The screenshot shows the 'Favorites' menu in the CONNECT HCM 9.2 interface. The menu is open, displaying a list of 'Recently Used' items and 'My Favorites'. Below the menu, there are sections for 'Home/Mailing Addresses' and 'Phone Numbers' with tables and 'Change' buttons.

Home/Mailing Addresses

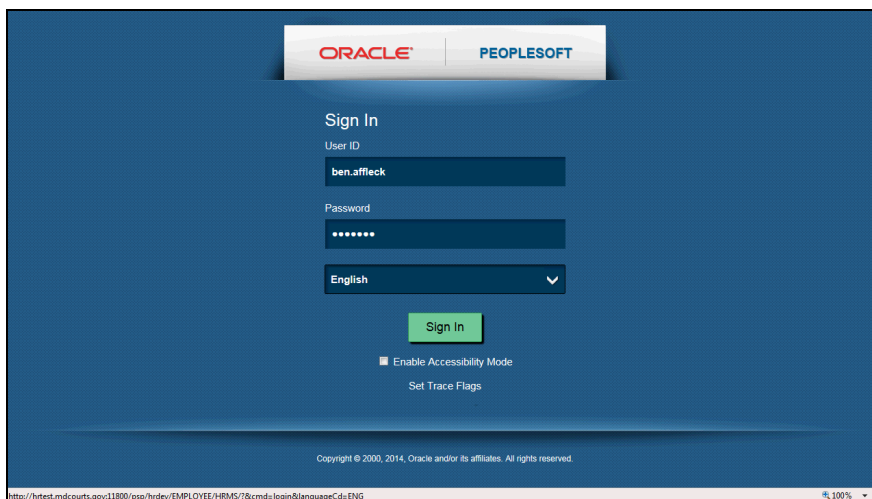
Address Type	Status	As Of	Country	Address
Home	Current	01/01/2014	USA	123 Main St Annapolis, MD 21204

Phone Numbers

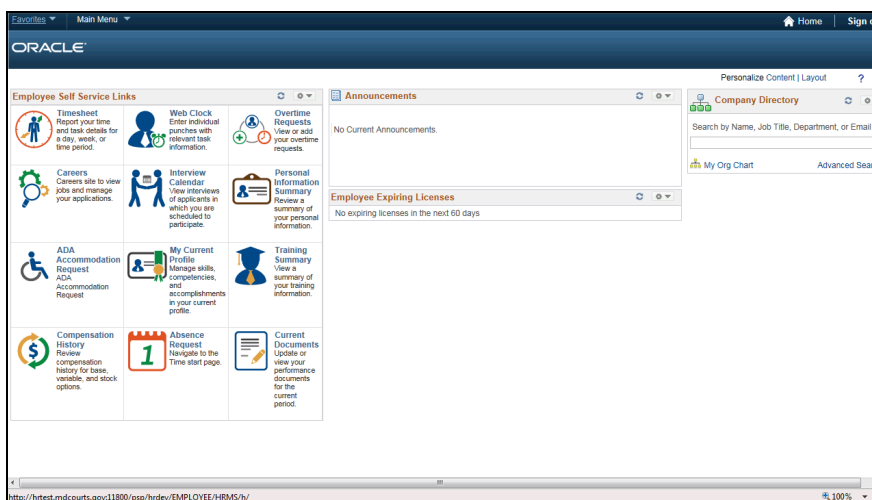
Phone Type	Phone Number	Preferred
Business	410/283-1273	<input checked="" type="checkbox"/>

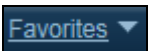
Procedure



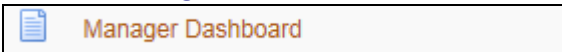



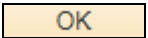
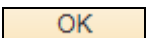


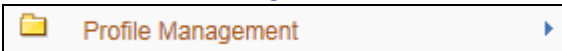
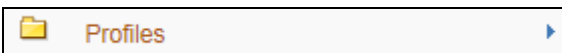
During this topic you will learn how to maximize the use of the favorites menu by adding and editing your list of commonly used pages.



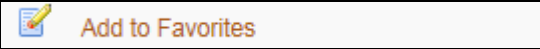

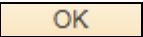
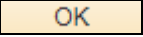
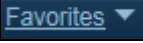



Step	Action	Notes
1.	Click the Sign In button. 	



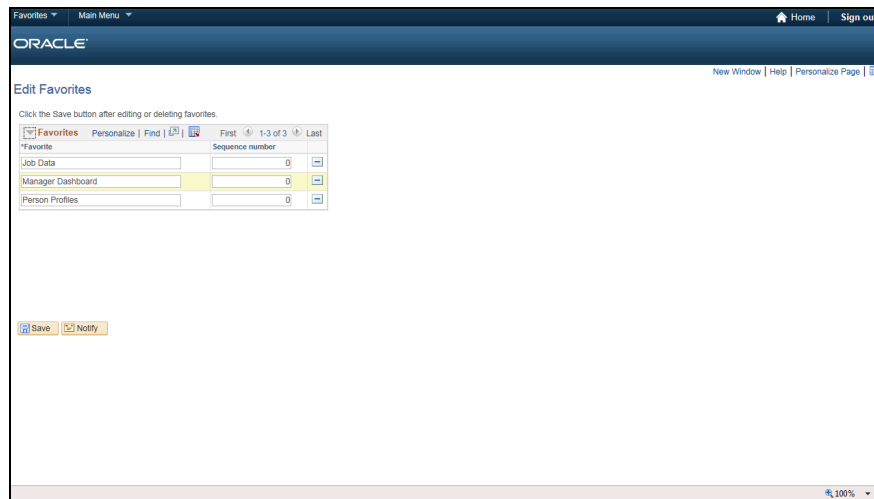
Step	Action	Notes
2.	Click the Favorites button. 	
3.	Use the Favorites menu to quickly access (without menu navigation) the last several Recently Used pages and any pages that you've added to My Favorites .	

Step	Action	Notes
4.	Click the Main Menu button. 	
5.	For example if you access the Manager Dashboard page often, this page can be added to your Favorites. Navigate to the Manager Dashboard page. Click the Manager Self Service menu. 	
6.	Click the Manager Dashboard menu. 	
7.	Once the page loads we can add it to our favorites list.	
8.	Click the Favorites button. 	
9.	Click the Add to Favorites menu. 	
10.	You may change the description here if you like. For this lesson, we will accept the default. Click in the Description field. 	
11.	Click the OK button. 	
12.	Click the OK button. 	
13.	We will add another page to our favorites. For this example we will navigate to the Person Profile page. Click the Main Menu button. 	
14.	Click the Workforce Development button. 	
15.	Click the Profile Management menu. 	
16.	Click the Profiles menu. 	

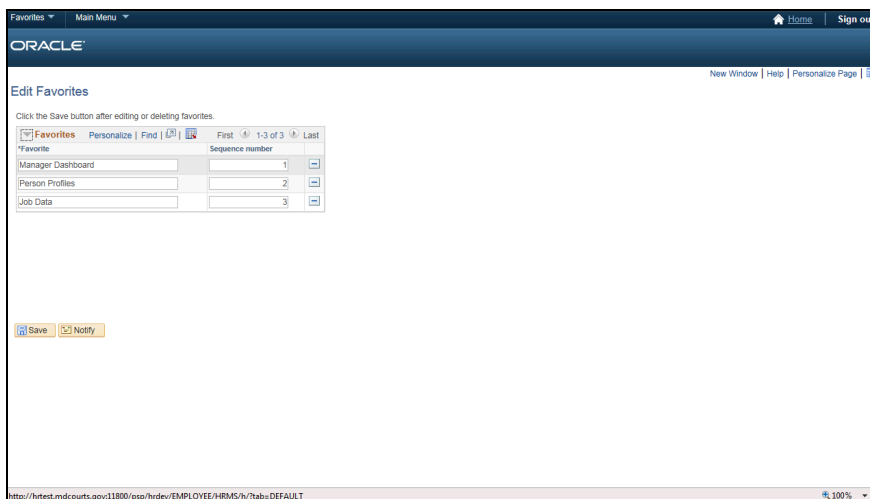
Step	Action	Notes
17.	Click the Person Profiles menu. 	
18.	We will repeat the same steps to add Person Profiles to our favorites. Click the Favorites button. 	
19.	Click the Add to Favorites menu. 	
20.	Click in the Description field. 	
21.	Click the OK button. 	
22.	Click the OK button. 	
23.	Let's view our new additions. Click the Favorites button. 	
24.	Manager Dashboard and Person Profiles are now in the My Favorites list.	
25.	Use the Edit Favorites page to control the order in which you want your favorites to appear in the Favorites menu and to delete favorites. Click the Edit Favorites menu. 	

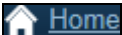

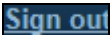
TRAINING GUIDE

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Step	Action	Notes
26.	Use Sequence number to order your favorites. Click in the Sequence number field. <input type="text" value="0"/>	
27.	Press [Backspace] to delete the current data.	
28.	Manager Dashboard will be the first in the sequence. Enter " 1 " into the Sequence number field.	
29.	Click in the Sequence number field. <input type="text" value="0"/>	
30.	Press [Backspace] to delete the current data.	
31.	Person Profiles will be second in the sequence. Enter " 2 " into the Sequence number field.	
32.	Click in the Sequence number field. <input type="text" value="0"/>	
33.	Press [Backspace] to delete the current data.	
34.	Job Data will now be third in the sequence. Enter " 3 " into the Sequence number field.	
35.	You must save after editing or deleting. Click the Save button. <input type="button" value="Save"/>	



Step	Action	Notes
36.	<p>Clear the page display.</p> <p>Click the Home link.</p> 	
37.	<p>Let's view our changes.</p> <p>Click the Favorites button.</p> 	
38.	<p>Notice how the order of My Favorites is now in the sequence we created.</p>	
39.	<p>You have completed learning how to add pages to My Favorites list menu.</p> <p>Click the Sign out link.</p> 	
40.	<p>Congratulations! You have learned how to add pages to the favorites menu list for quick access to your most used pages in CONNECT.</p> <p>End of Procedure.</p>	

Component Tab Menu and Other Links

Component pages may include additional sections which you will navigate using **tab-based menus** as illustrated below.

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CONNECT HCM 9.2 Fundamentals



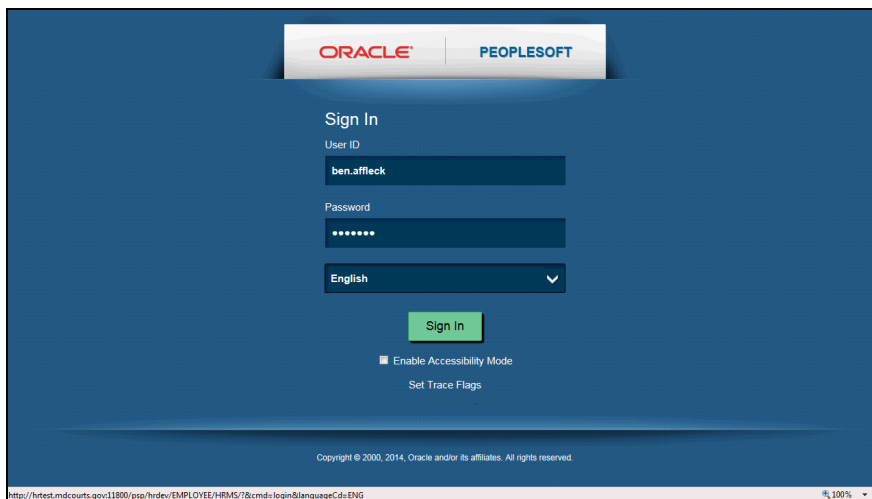
Oracle HCM Cloud interface showing the 'Job Data' tab for employee 'Ricky Martin' (Empl ID: 000700184). The 'Work Location' tab is selected, displaying various fields including Effective Date (05/01/2015), Position Number (590000339), and Department Entry Date (03/09/2015). The 'Job Data' section is highlighted with a red box. Below the main form, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. The 'Job Data' tab is currently active.

Occasionally you will see pages that, in addition to having links to other sections within the same component, have links to related components or pages. The related component links appear at the bottom of the transaction area as illustrated below.

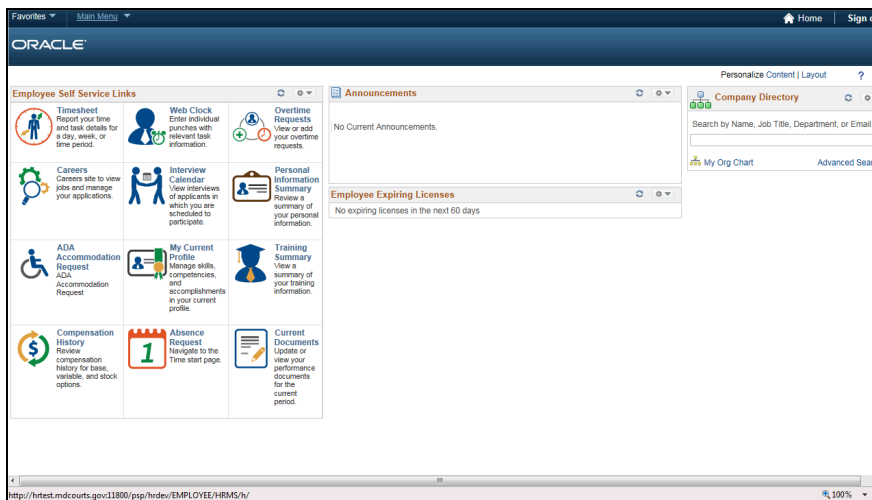
Oracle HCM Cloud interface showing the 'Job Data' tab for employee 'Ricky Martin' (Empl ID: 000700184). The 'Work Location' tab is selected, displaying various fields including Effective Date (05/01/2015), Position Number (590000339), and Department Entry Date (03/09/2015). The 'Job Data' section is highlighted with a red box. Below the main form, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. The 'Job Data' tab is currently active.




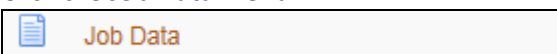
Procedure

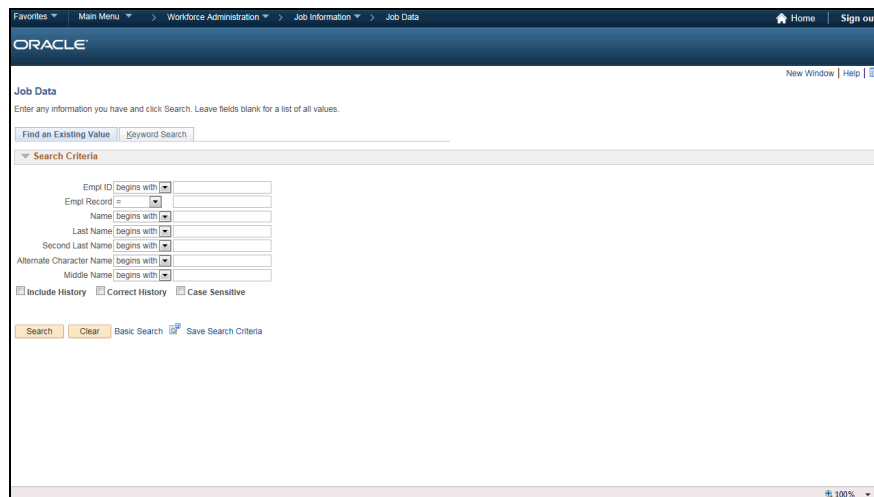
During this lesson we will explain what a component tab menu is all about.





Step	Action	Notes
1.	Click the Sign In button. 	

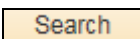


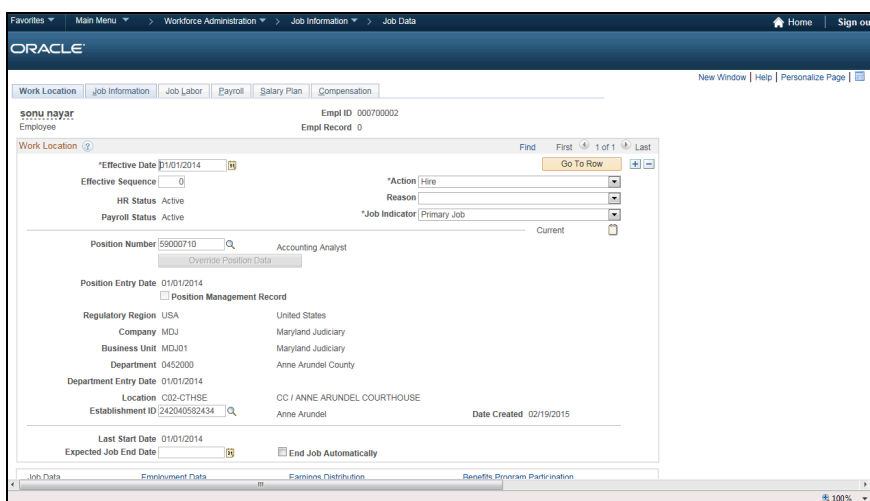
Step	Action	Notes
2.	For this example we will navigate to the Job Data page. Click the Main Menu button. 	
3.	Click the Workforce Administration menu. 	
4.	Click the Job Information menu. 	
5.	Click the Job Data menu. 	



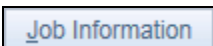
Oracle Job Data search interface. The page includes a search bar with 'Find an Existing Value' and 'Keyword Search' buttons. Below is a 'Search Criteria' section with dropdown menus for 'Empl ID begins with', 'Empl Record =', 'Name begins with', 'Last Name begins with', 'Second Last Name begins with', 'Alternate Character Name begins with', and 'Middle Name begins with'. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

Step	Action	Notes
6.	We will pull an employee record to view the Job Data page details. Click in the Last Name field. 	
7.	Enter " Nayar " into the Last Name field.	
8.	The type ahead provides you with a list of options to choose from based on your entry. Click the NAYA object. 	

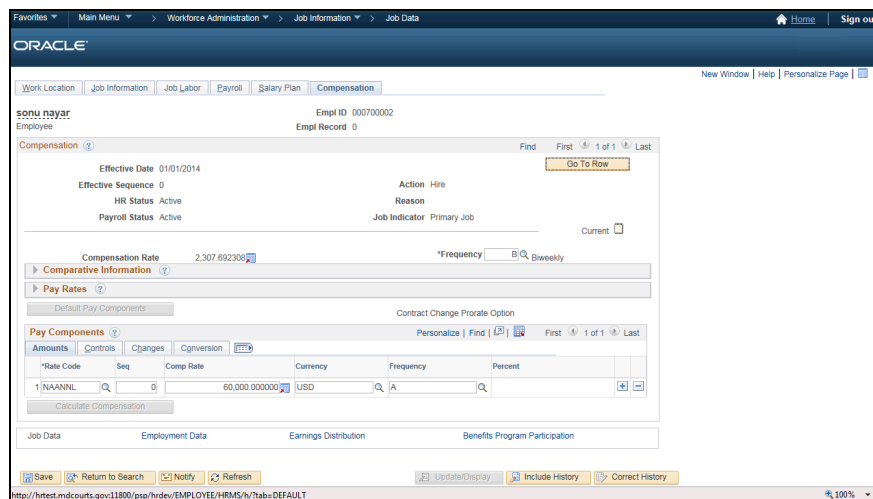
Step	Action	Notes
9.	Click the Search button. 	
10.	To enter data in a CONNECT you will first access a component. In this example we are accessing Job Data Components consist of one to several pages within the same window. Usually these are pages that are related and need to be completed in succession.	



The screenshot displays the Oracle HCM Cloud interface for the 'Job Information' page. The employee's name is 'sonu nayar' with Employee ID '000700002'. The page is divided into several tabs: 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Job Information' tab is currently active. It contains various fields for job details, including 'Effective Date' (01/01/2014), 'Position Number' (56000710), 'Position Entry Date' (01/01/2014), 'Regulatory Region' (USA), 'Company' (MDJ), 'Business Unit' (MDJ01), 'Department' (0452000), 'Location' (C02-CTHSE), and 'Establishment ID' (24204052434). The page also shows 'Last Start Date' (01/01/2014) and 'Expected Job End Date' (01/01/2014). At the bottom, there are links for 'Job Data', 'Enrollment Data', 'Exemptions Distribution', and 'Benefits Program Participation'.

Step	Action	Notes
11.	To move between the pages, you can select the folder tabs or ... Click the Job Information tab. 	
12.	... or click the links at the bottom of each page.	


Step	Action	Notes
13.	<p>Occasionally you will see pages that, in addition to having links to other pages in the component, have links to related components or pages. The related links appear at the bottom of the transaction area above the toolbar. Click any of these links to access that page or component. This convenience enables you to move easily to related transactions for the same key field to enter data without going through the search process again.</p> <p>When you click a component link, you will notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:" along with the related links at the bottom of a page. You might also see a list box with "...More," which contains several more related transaction links.</p>	
14.	<p>You can use the New Window link to open a new browser window, or child window. The new window shows the current component page as well as the navigation to your current position. From this window, you can view or enter data. You can open as many child windows as needed using the New Window link.</p> <p>Do not use your browser's File > New > Window feature. Doing so copies the current HTML from the parent window, instead of opening a new CONNECT-maintained window session.</p>	

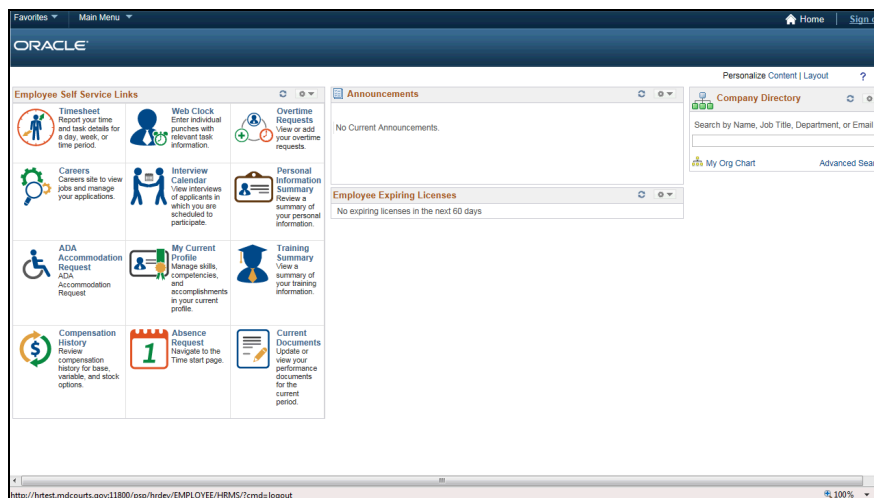


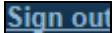
The screenshot displays the Oracle HCM Cloud interface for the Compensation component. The user is logged in as Sonu Nayyar (Employee ID: 000700002). The page shows the following details:

- Compensation:** Effective Date: 01/01/2014, Effective Sequence: 0, Action: Hire, Reason: HR Status: Active, Payroll Status: Active, Job Indicator: Primary Job.
- Compensation Rate:** 2,307.692308, Frequency: Biweekly.
- Pay Rates:** Default Pay Components, Contract Change Prorate Option.
- Pay Components:** A table with columns: Rate Code, Seq, Comp Rate, Currency, Frequency, Percent. The table shows one component with Rate Code 1, Seq NAANNL, Comp Rate 60,000.000000, Currency USD, Frequency A, and Percent.

The page includes navigation tabs (Work Location, Job Information, Job Labor, Payroll, Salary Plan, Compensation) and a toolbar with buttons like Save, Return to Search, Notify, Refresh, Update/Display, Include History, and Correct History.

Step	Action	Notes
15.	<p>You have completed the component tab menu and other links topic.</p> <p>Click the Home link.</p> 	



Step	Action	Notes
16.	<p>Click the Sign out link.</p> 	
17.	<p>Congratulations! You have completed the Component Tab Menu and Other Links topic.</p> <p>End of Procedure.</p>	

Personalization

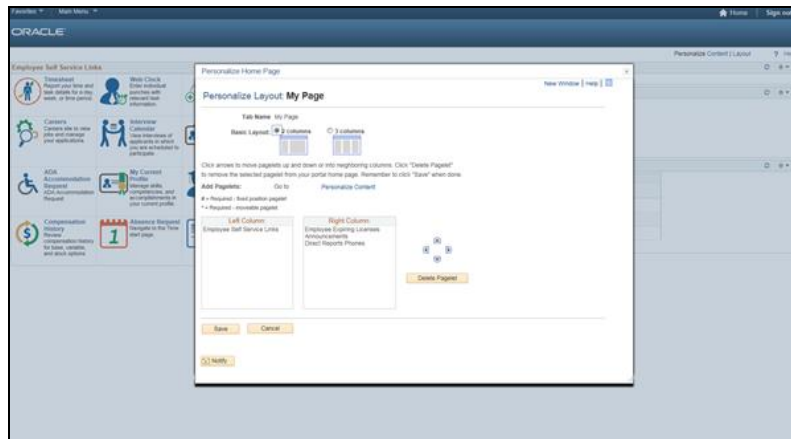
The **Personalization** section provides an overview of home page personalization and demonstrates how to:

- use the Content options.
- use the Layout options.

Personalizing Your Home Page

With the CONNECT portal you can define and store your own **portal homepages** and specify preferences for layout and content. The first time you log in to the CONNECT portal, you will see the default homepage for that portal until you define a personal homepage.

Illustrated below is the HCM homepage.



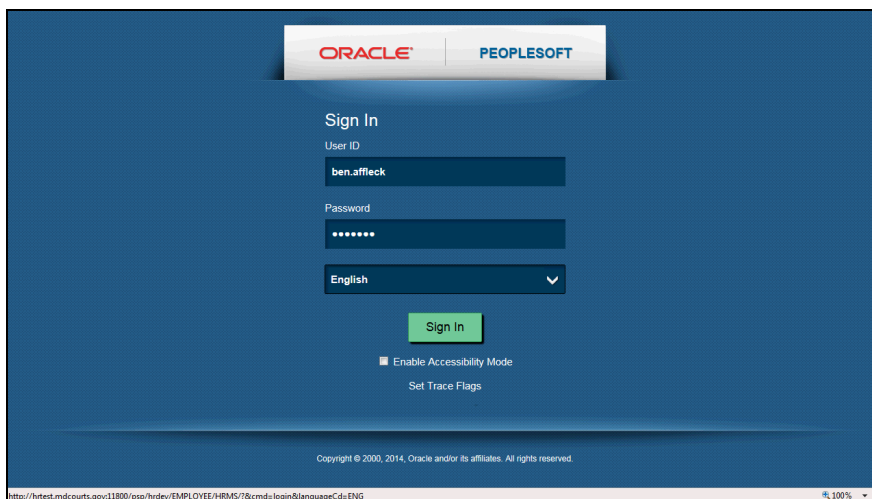
One of the available web page functionalities is providing the user with the ability to rearrange content windows. The following **Video Tutorial: HOW TO REORGINIZE YOUR HOMEPAGE PAGELETS** will demonstrate how to drag and drop content windows (pagelets) to reorganize your homepage. This tutorial is to supplement the full demonstration which is accessible using the Try it! simulation mode.




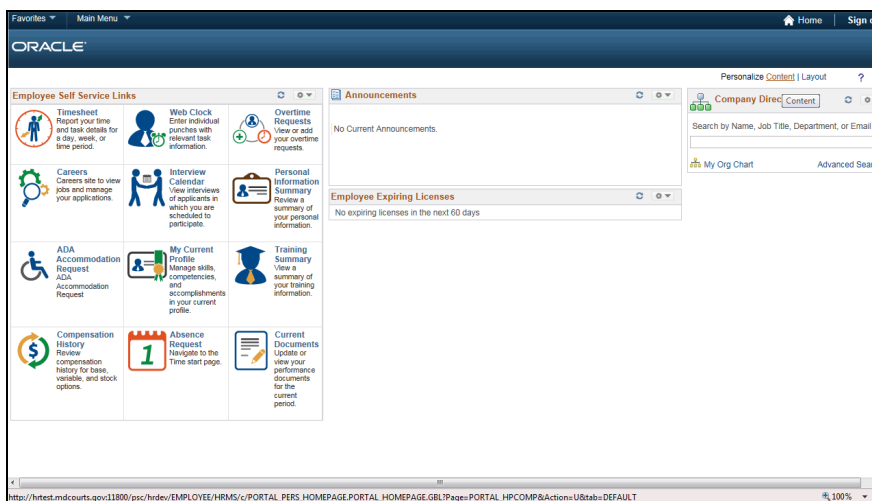
(Video in MP4 file format will open in your Windows Player application) Watch video on how to drag and drop to move pagelets into different positions within your homepage.


Procedure

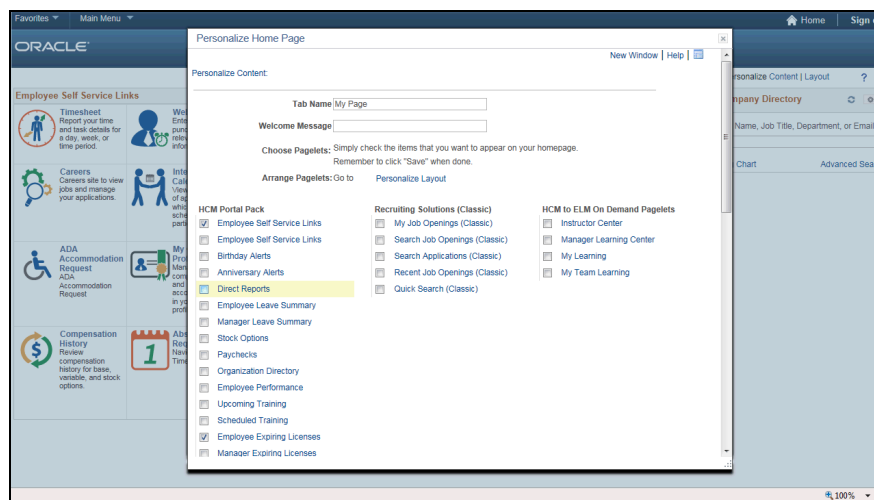
During this lesson we will demonstrate how to use the home page content and layout personalization options.



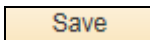


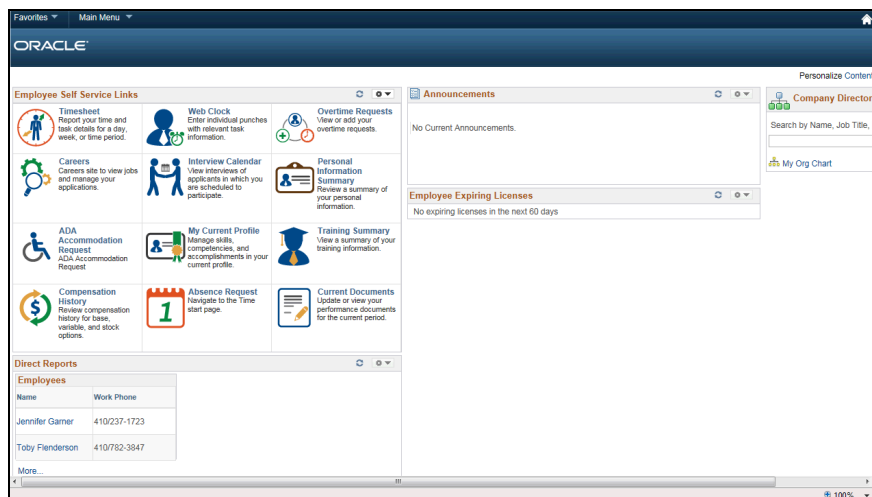
Step	Action	Notes
1.	Click the Sign In button. 	
2.	For your CONNECT HCM homepage you can specify your own preferences for their layout and content. The home page is set with predefined pagelets. A pagelet is a small window that provides quick access and view to summary information.	


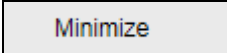




Step	Action	Notes
3.	<p>Begin by accessing the Personalize Content and Layout links to make your changes.</p> <p>Click the Content link.</p> 	
4.	<p>Select from the displayed check boxes to choose the pagelets that you want to appear on your personalized homepage.</p> <p>The selection of pagelets is preset by the portal administrator. You can preview each pagelet by clicking the pagelet name. A preview of the pagelet opens in another smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.</p>	

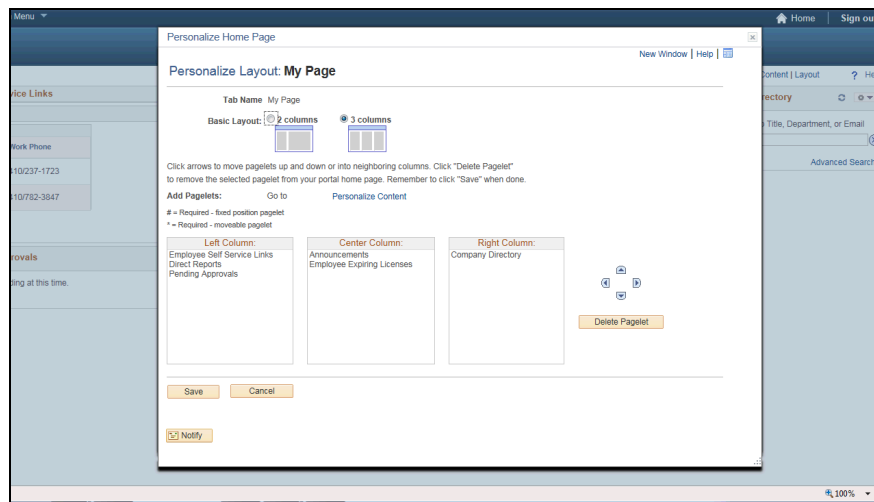


Step	Action	Notes
5.	<p>Select the Direct Reports option by clicking the check box.</p> 	
6.	<p>Click the scroll bar to view more options.</p>	
7.	<p>Select the Pending Approvals option by clicking the check box.</p> 	
8.	<p>Click the Save button.</p> 	
9.	<p>Each pagelet includes a Refresh button and a Pagelet Settings button, both located on the right side of the pagelet's header.</p>	



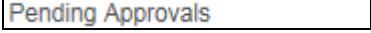



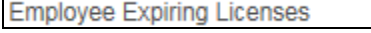

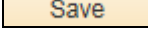


Step	Action	Notes
10.	<p>The Pagelet Settings button provides the options for Minimizing, Removing, or in some cases Customizing the individual pagelet.</p> <p>Click the Pagelet Settings button.</p> 	
11.	<p>For this tutorial we want to temporarily hide the view of the Employee Self Service Links pagelet.</p> <p>Click the Minimize link.</p> 	
12.	<p>Click the scrollbar to view other options.</p> 	
13.	<p>Now that we have the pagelets that provide the information we like to have accessible every time we log into CONNECT, we can arrange them in any order we like.</p> <p>Click the Layout link.</p> 	

Step	Action	Notes
14.	<p>You can select a basic layout of two columns or three columns.</p> <p>A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet.</p> <p>The two pagelets added (Direct Reports and Pending Approvals) are now listed in the first of three columns. To arrange the layout for personal preference, the selections can be moved up, down, and into the center or right columns using the arrows to the right of the columns.</p>	

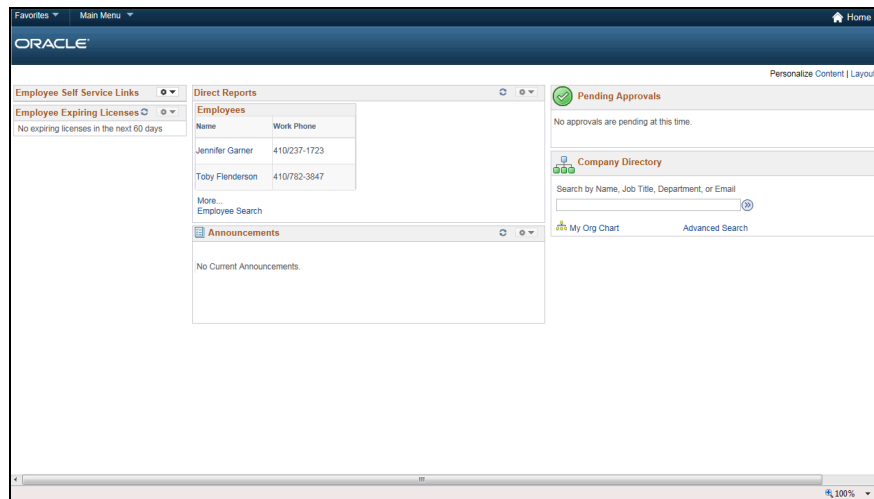



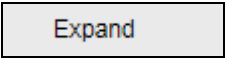
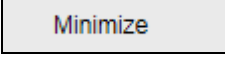

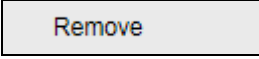
Step	Action	Notes
15.	<p>You arrange the pagelet by highlighting the name and clicking the arrow keys. You can move a pagelet right or left, from one column to another, and up and down within a column.</p> <p>Click the Direct Reports list item.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Direct Reports</div>	
16.	<p>Click the Move Right button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">▶</div>	
17.	<p>Notice that now Direct Reports is in the Center (second) Column.</p>	

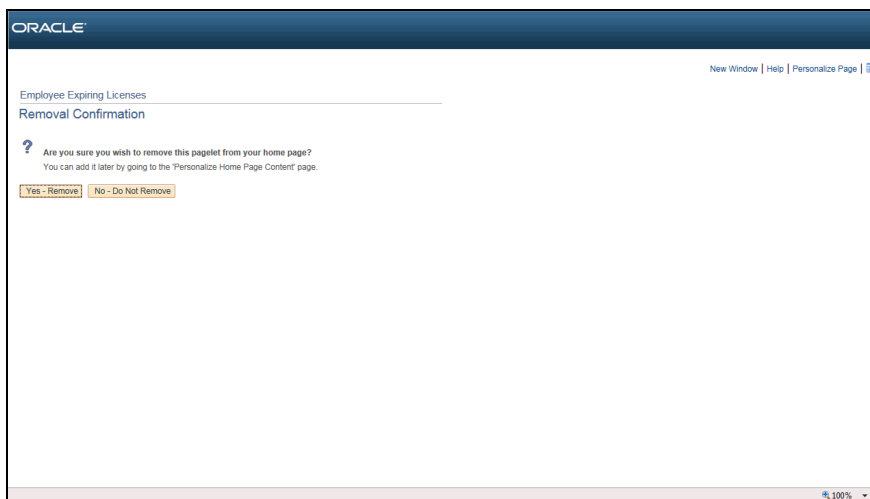
Step	Action	Notes
18.	<p>You can reorganize the order within the column.</p> <p>Click the Move Up button.</p> 	
19.	<p>Click on the move up arrow one more time to make Direct Reports the first one in the column.</p> <p>Click the Move Up button.</p> 	
20.	<p>Click the Pending Approvals pagelet.</p> 	
21.	<p>Click the Move Right button.</p> 	
22.	<p>Click the Move Right button again to move the Pending Approvals to the Right Column.</p> 	
23.	<p>Click the Move Up button.</p> 	
24.	<p>Click the Employee Expiring Licenses pagelet.</p> 	
25.	<p>Click the Move Left button.</p> 	
26.	<p>Now that you have reorganized your pagelets, save the changes and let's see how the home page looks.</p> <p>Click the Save button.</p> 	
27.	<p>Notice how the pagelets are in different locations.</p>	

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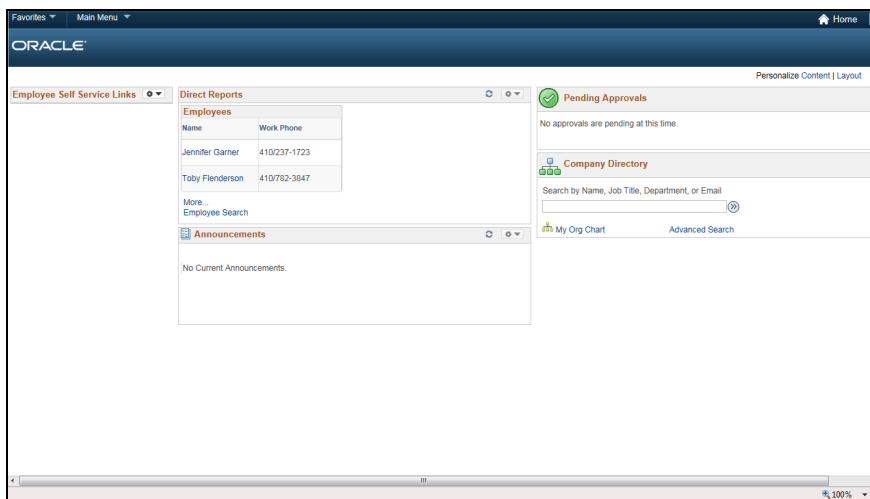
CONNECT HCM 9.2 Fundamentals




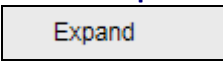


Step	Action	Notes
28.	Let's expand the minimized pagelet to view it. Click the Pagelet Settings button. 	
29.	Click the Expand link. 	
30.	Now we can view the Employee Self Service Links pagelet. We also have the Employee Expiring Licenses pagelet open but it is not providing any useful information at this time. Let's remove the pagelet from our homepage. But first let's minimize the Employee Self Service Links so we can better see our changes.	
31.	Click the Minimize link. 	
32.	Now let's remove the Employee Expiring Licenses pagelet. Click the Pagelet Settings button. 	
33.	Click the Remove link. 	

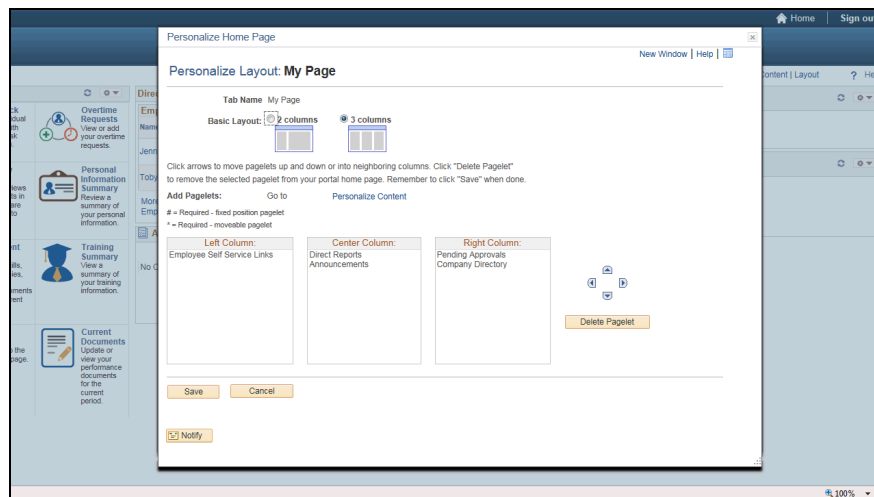


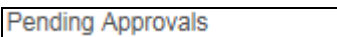



Step	Action	Notes
34.	<p>You will always be prompted to confirm removing a pagelet from the homepage.</p> <p>Click the Yes - Remove button.</p> <p>Yes - Remove</p>	

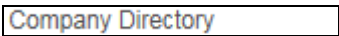



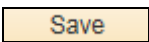


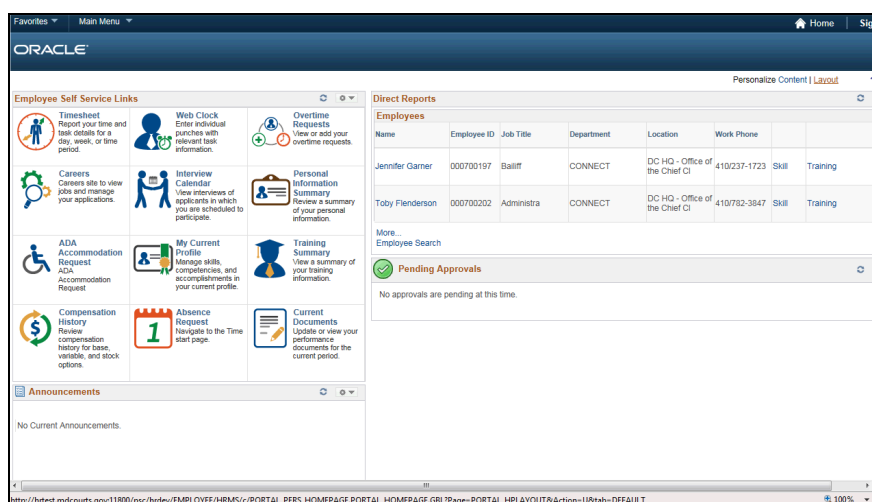
Step	Action	Notes
35.	<p>Now let's expand the Employee Self Service Links pagelet.</p> <p>Click the Pagelet Settings button.</p> <p></p>	

Step	Action	Notes
36.	Click the Expand link. 	
37.	Now that we have all the pagelets we want on our homepage, let's see how we can use the Layout options. Click the scrollbar . 	
38.	Click the Layout link. 	
39.	Notice we have the three column layout selected to display our pagelets.	

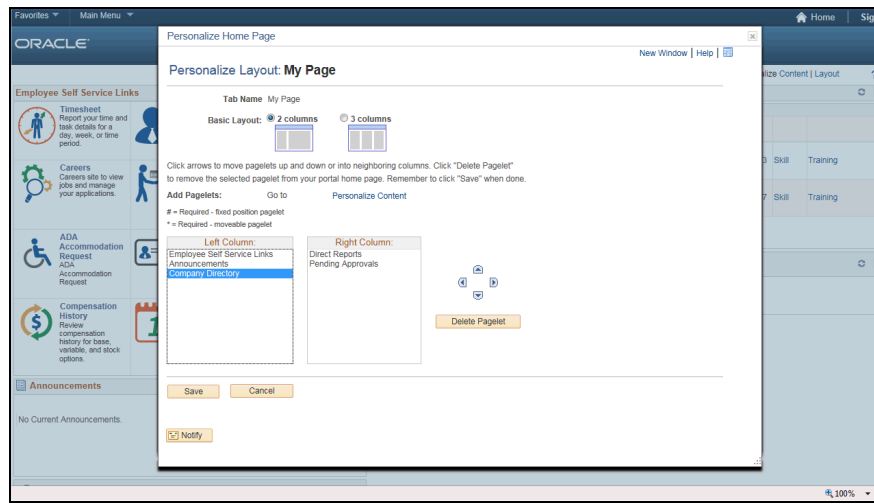


Step	Action	Notes
40.	To change our layout to two columns we will reorganize our pagelets. Click the Pending Approvals list item. 	
41.	Click the Move Left button. 	
42.	Click the Move Up button. 	
43.	Click the Move Up button. 	

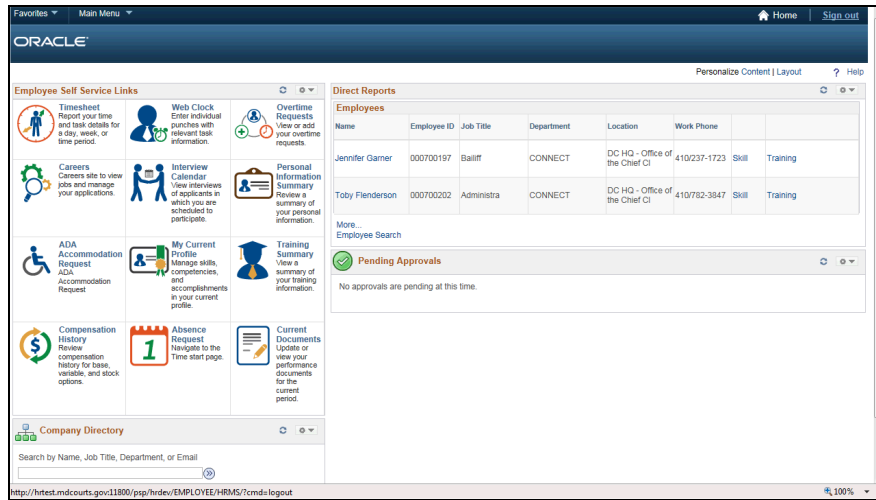
Step	Action	Notes
44.	Click the Company Directory list item. 	
45.	Click the Move Left button. 	
46.	Click the Delete Pagelet object. 	
47.	Now let's make the 2 column layout our selection. Select the 2 columns by clicking the radio button. 	
48.	Click the Save button. 	
49.	Notice how now we have the two column layout and the pagelets have been reorganized.	
50.	Another quick way to rearrange your pagelets is to use drag and drop with the mouse. Watch Video Tutorial (Video file format: MP4, will open in your Windows Player application) or you may interact with the simulation.	
51.	Notice where the Announcement pagelet is located.	



Step	Action	Notes
52.	Click the Layout link. 	



Step	Action	Notes
53.	<p>To delete a pagelet you must select the pagelet first. For this example we will remove the Announcements pagelet.</p> <p>Select the Announcements list item.</p> <p>Announcements</p>	
54.	<p>NOTE: This action will not be confirmed. If you delete the incorrect pagelet you will need to access the Content options, select the pagelet, and save to reestablish it on the homepage.</p> <p>Click the Delete Pagelet button.</p> <p>Delete Pagelet</p>	
55.	<p>Click the Save button.</p> <p>Save</p>	
56.	<p>Notice now the Announcements pagelet is no longer available. Remember you can always reestablish any pagelet by accessing the Personalize Content (top link) options.</p>	



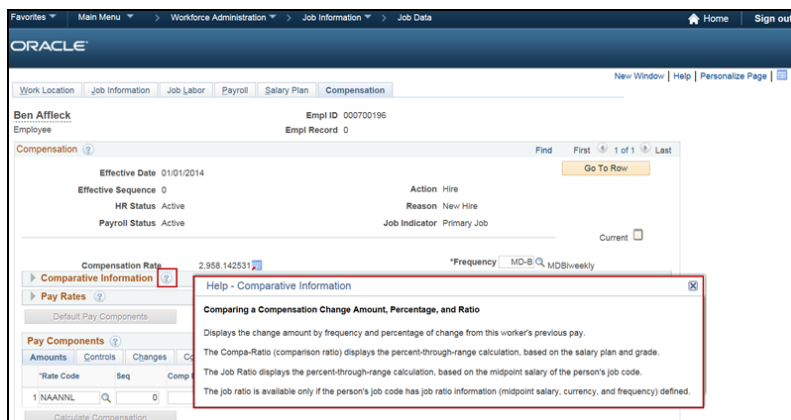
Step	Action	Notes
57.	Click the Sign out link. Sign out	
58.	You have completed the personalizing your home page lesson. End of Procedure.	

In-Application Support

The in-application support refers to the help link and embedded help information available throughout CONNECT.

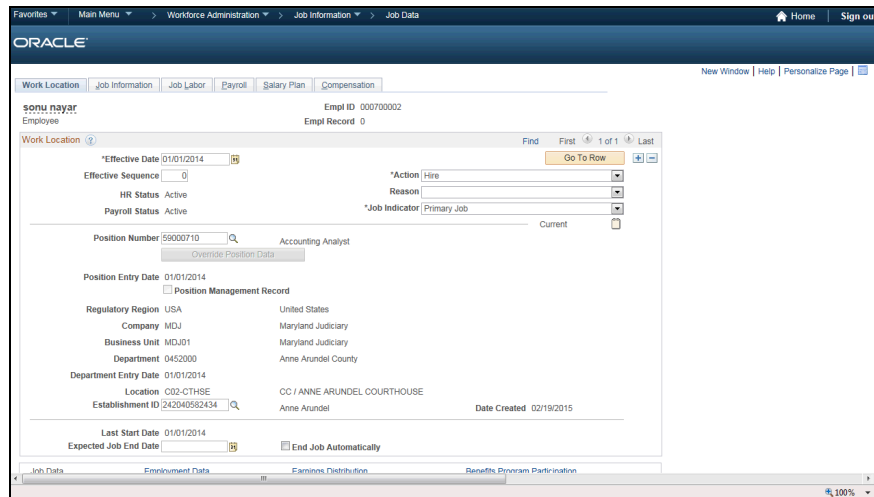
Embedded Help



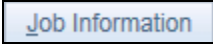
Embedded Help is available for some components and page sections and provide additional information.

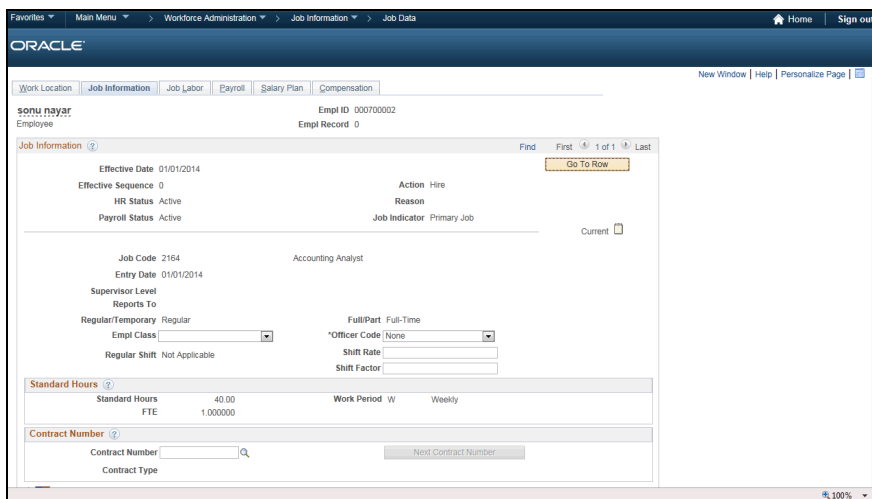




Procedure

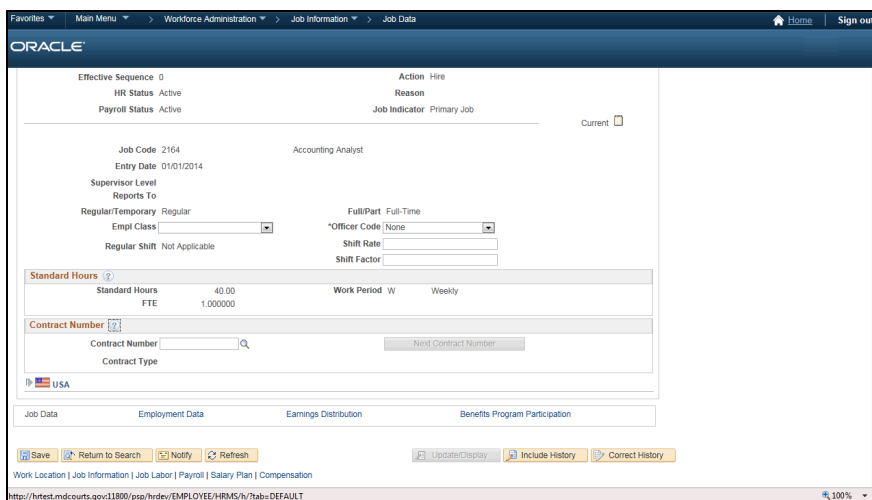
During this topic you will see how to identify and access the embedded help information.



Step	Action	Notes
1.	<p>Embedded Help is available for some components and page sections and provide additional information.</p> <p>Click the Help button (? icon).</p> 	
2.	<p>The embedded help modal prompt opens up and provides you with detailed information on the subject.</p> <p>Click the Close button.</p> 	
3.	<p>Click the Job Information tab.</p> 	



Step	Action	Notes
4.	<p>You can find the embedded help icon in the component sections next to the title.</p> <p>Click the Help button.</p> 	
5.	<p>Click the Close button.</p> 	



Step	Action	Notes
6.	<p>Click the Home link.</p> 	

Step	Action	Notes
7.	Click the Sign out link. Sign out	
8.	You have completed reviewing the Embedded Help available throughout the system. End of Procedure.	

Using Keys and Search Pages

This lesson provides an overview of **keys** and **search pages**, and describes how to use **search pages** to retrieve the data you need.

Upon completion of this lesson, you will be able to:

- Describe how keys are used to perform a search.
- Perform a search to access a page.
- Use an operator to perform a search.
- Use a wildcard to perform a search.

Understanding Keys

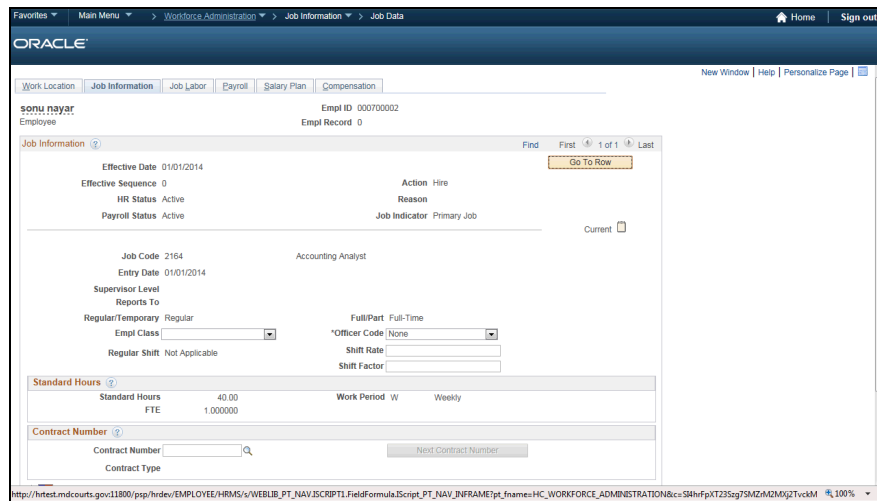
A field or a combination of fields uniquely identifies every table in your CONNECT database. For example, the employee ID field uniquely identifies your employee records. As another example, when employees enroll in training classes, the combination of employee ID, course code, and course start date uniquely identifies enrollment requests.




The fields that uniquely identify your data are called **keys**.


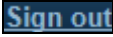
This topic discusses the use of **keys** in CONNECT.

Procedure

During this topic we will identify and explain (data) keys.



Step	Action	Notes
1.	Click the Workforce Administration button. 	
2.	Click the Personal Information menu. 	
3.	Click the Modify a Person menu. 	
4.	A field or a combination of fields uniquely identifies every row in a table in CONNECT database. For example, a Person ID uniquely identifies each row in the Personal Information table.	
5.	Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are prompted for new search keys only when you select a new page outside of a component with a different search record.	
6.	The fields that uniquely identify your data are called keys . To display a page, you enter the search key(s) on the search page so that the system can retrieve the correct row of data. For example, if you want to review a summary of absence history for your employees, you must specify or search for the data by using the Person ID .	
7.	A search record is the list of defined search keys that help you locate data. The search keys are the fields you are prompted for on a search page. For example, you can search for an employee by using one or a combination of the keys displayed on this page.	

Step	Action	Notes
8.	Click the Home link. 	
9.	Click the Sign out link. 	
10.	You have completed reviewing the Understanding Keys topic. End of Procedure.	

Using Search Pages

There are two types of **search pages**: basic search pages and advanced search pages. When you select a page, the system often displays a Find an Existing Value tab (or something similar) that enables you to do a basic search and provides an Advanced Search link.

A basic search page enables you to search by just one field at a time, and then only using the “begins with” operator. To designate the search field, if more than one is available, select the desired field from the Search by drop-down list box and then click the Search button to display the results of your search. You can perform a partial search by first entering part of a name or description in the “begins with” text box.

On the advanced search page, you can narrow your search, both by searching based on more than one field at a time and by using a variety of search operators.

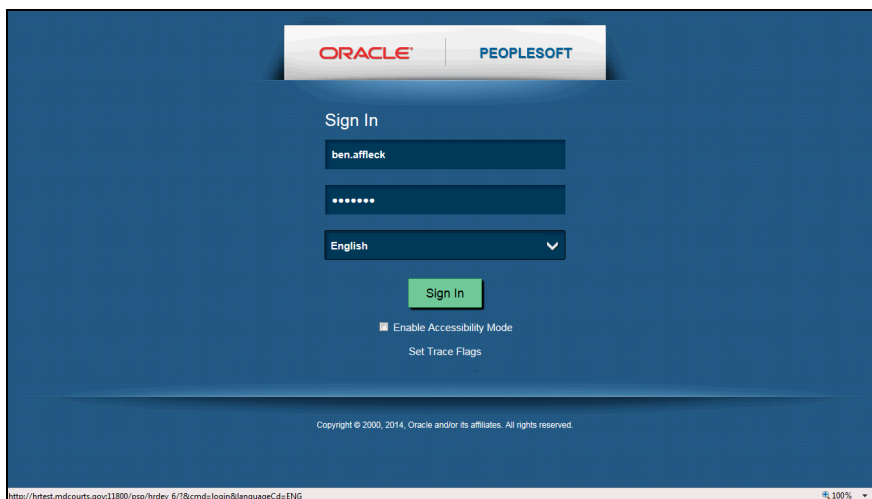
In some cases, search pages may include the Include History and Correct History options. In addition, search pages contain the Case Sensitive check box to enable you to perform case-sensitive searches.

When you open a page or component, a search page appears prompting you for the search keys needed to locate the data.

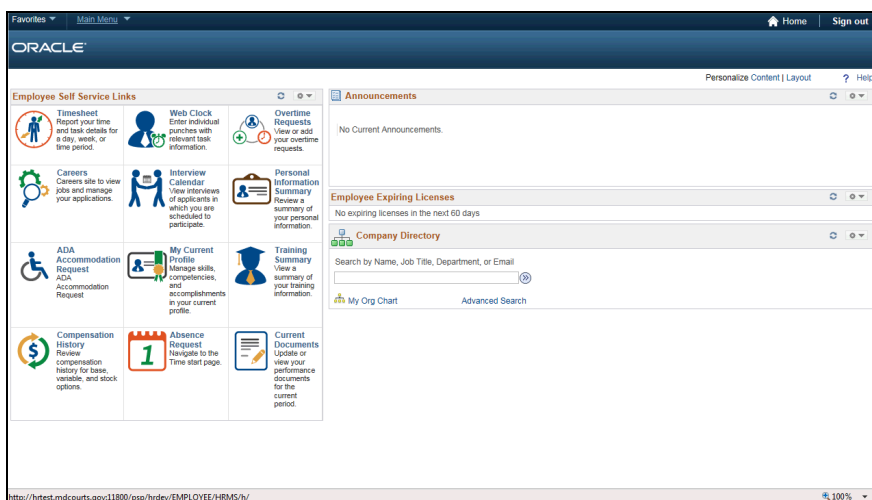
This topic describes how to effectively use search pages.

Procedure

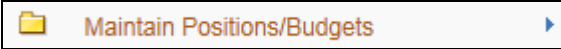

During this topic we will demonstrate the use of search pages.

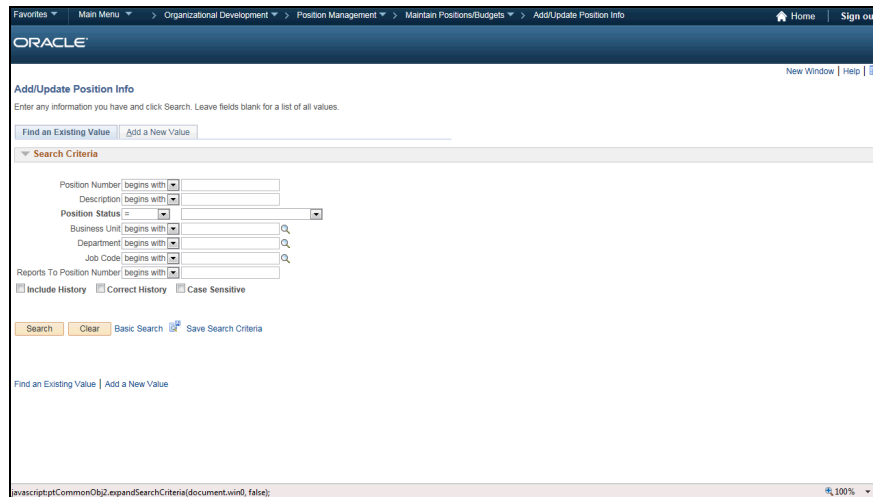


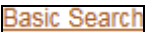
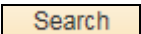
Step	Action	Notes
1.	Click the Sign In button. 	






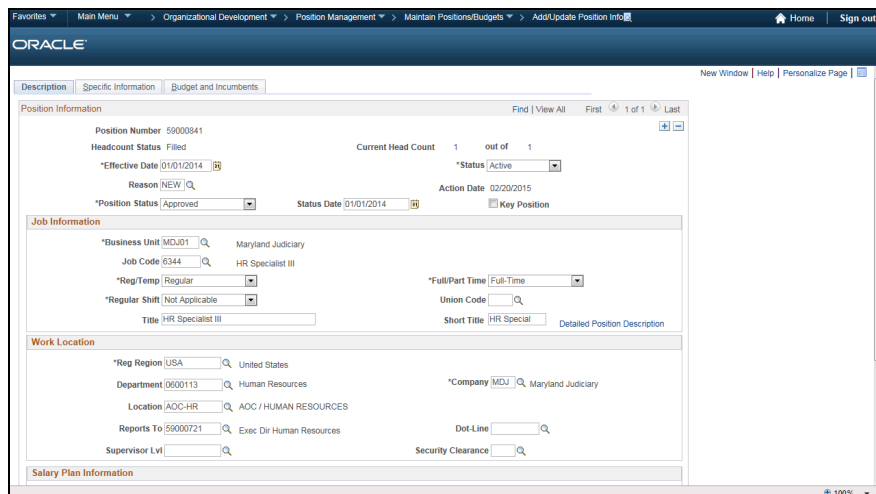
Step	Action	Notes
2.	Click the Main Menu button. 	
3.	Click the Organizational Development menu. 	
4.	Click the Position Management menu. 	

Step	Action	Notes
5.	Click the Maintain Positions/Budgets menu. 	
6.	Click the Add/Update Position Info menu. 	



Step	Action	Notes
7.	When you select a page, the system often displays a Find an Existing Value tab that enables you to do a basic search. For this example enter "59" into the Position Number field.	
8.	There are two types of search pages: the basic search page and the advanced search page. When you select a page, the system often displays an advanced search page on the Find an Existing Value tab. You may also click the Add a New Value tab to add a new row of data to the table. Click the Basic Search link. 	
9.	In general, a basic search page offers just one or two fields in which you may perform your search. You designate which key field you want to search with by entering text in the Search by field. Click the Search button. 	

Step	Action	Notes
10.	A list of Position Numbers that use the Position are displayed in the Search Results grid.	
11.	<p>With a basic search, you have the option of changing your search criteria. The Search by list box enables you to select different search keys to search against the database. You can also enter full or partial values for the key field. For example, you may not know the Position Number, but you know that the position number begins with a "59".</p> <p>Click the Search by list.</p> 	
12.	<p>Click the Job Code list item.</p> 	
13.	We know the Job Code we are searching for begin with 63. Enter " 63 " into the begins with field.	
14.	Click the Search button.	
15.	<p>The Search Results show all rows matching your search criteria. In this case, these are all the Job Codes in the database with codes that begin with 63. You are looking for the HR Specialist III. With a basic search, only the first column in the Search Results list is displayed as a link.</p> <p>Click the 6344 link.</p> 	
16.	The Position Information page is displayed and includes the Job Code field HR Specialist III.	

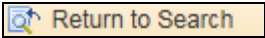


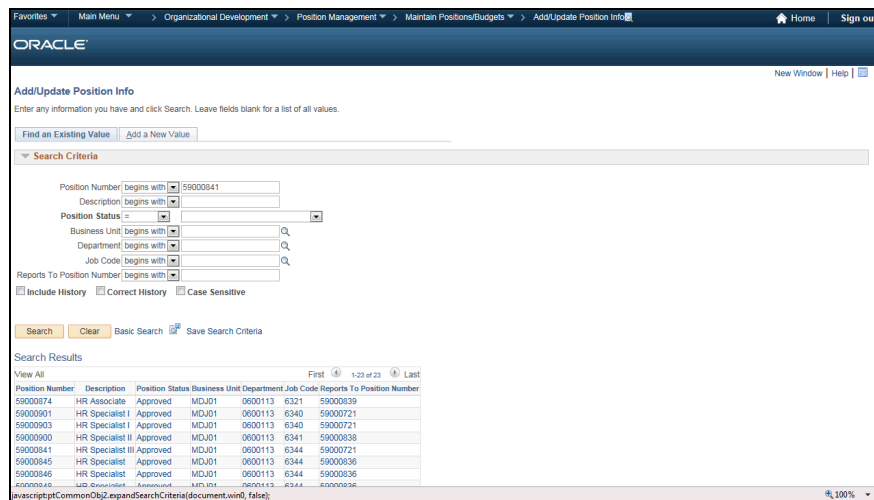
The screenshot shows the Oracle HCM Position Information page. The page is divided into several sections: Position Information, Job Information, Work Location, and Salary Plan Information. The Position Information section includes fields for Position Number (50000841), Headcount Status (Filled), Current Head Count (1 out of 1), Effective Date (01/01/2014), Reason (NEW), Position Status (Approved), Status Date (01/01/2014), Action Date (02/20/2015), and Status (Active). The Job Information section includes fields for Business Unit (MDJ01), Job Code (6344), Reg/Temp (Regular), Regular Shift (Not Applicable), Title (HR Specialist III), Full/Part Time (Full-Time), Union Code, and Short Title (HR Special). The Work Location section includes fields for Reg Region (USA), Department (000113), Location (AOC-HR), Reports To (50000721), Supervisor Lvl, Company (MDJ), and Security Clearance. The Salary Plan Information section is partially visible at the bottom.

TRAINING GUIDE

CONNECT HCM 9.2 Fundamentals



Step	Action	Notes
17.	Click to scroll down the page.	
18.	<p>If you want to look at data for another job code you can click the Return to Search button at the bottom of the page.</p> <p>Click the Return to Search button.</p> 	



Oracle HCM Cloud - Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Position Number begins with: 59000841
Description begins with:
Position Status:
Business Unit begins with:
Department begins with:
Job Code begins with:
Reports To Position Number begins with:
☐ Include History ☐ Correct History ☐ Case Sensitive

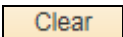
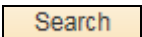
Search Clear Basic Search Save Search Criteria


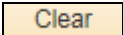

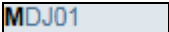

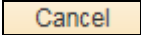
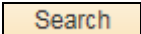

Search Results

View All First 1-23 of 23 Last

Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number
59000874	HR Associate	Approved	MDJ01	0600113	6321	59000839
59000901	HR Specialist I	Approved	MDJ01	0600113	6340	59000721
59000903	HR Specialist I	Approved	MDJ01	0600113	6340	59000721
59000900	HR Specialist II	Approved	MDJ01	0600113	6341	59000838
59000841	HR Specialist III	Approved	MDJ01	0600113	6344	59000721
59000945	HR Specialist	Approved	MDJ01	0600113	6344	59000836
59000846	HR Specialist	Approved	MDJ01	0600113	6344	59000836

JavaScriptCommonObj2.expandSearchCriteria(document.win0, false);

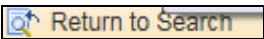
Step	Action	Notes
19.	<p>The system returns you to the advanced search page with the criteria from the previous search displayed.</p> <p>If you want to search again with new criteria, you can use the Clear button. The Clear button refreshes the page without saving so you can enter new criteria.</p> <p>Click the Clear button.</p> 	
20.	<p>The options on the advanced search page enable you to narrow your search by entering values in more than one type of criteria. The advanced search page contains several keys to search for your record.</p> <p>Enter "59" into the Position Number field.</p>	
21.	<p>Click the Search button.</p> 	

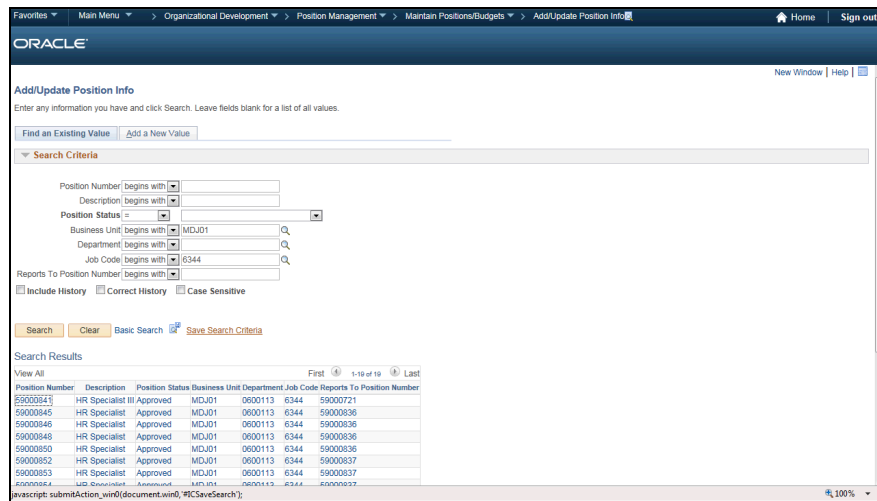
Step	Action	Notes
22.	The search function can retrieve up to 300 entries from the database, displaying several results at a time in the Search Results grid. Notice we have 213 records in our search results.	
23.	Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right arrow above the grid to view the next set of listings. Click the Show next rows link. 	
24.	Click the Clear button. 	
25.	Click in the Business Unit field. 	
26.	Enter the desired information into the Business Unit field. Enter "m".	
27.	Click the MDJ01 object. 	
28.	One way you can select criteria is by using the Lookup (magnifying glass) buttons provided for some of the fields. Click the Look up Job Code button. 	
29.	Use the Look Up modal prompt page to search for key values to use in your search criteria.	
30.	Click the Cancel button. 	
31.	Another way to narrow your search is to use a key or combination of keys with full or partial values. For example we have the Business Unit, MDJ01 entered. Let's combine that with entering "63" into the Job Code field.	
32.	Click the Search button. 	
33.	The 23 job codes that match this criteria are displayed in the Search Results table. With an advanced search, all the columns in the Search Results list are displayed as links. Click the 6344 link. 	

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CONNECT HCM 9.2 Fundamentals



Step	Action	Notes
34.	Click to scroll down the page.	
35.	<p>The Position Information page is displayed.</p> <p>Search List Navigation buttons are available to process your search. They are displayed below the transaction area of the page.</p>	
36.	The Previous in List button displays the data for the previous data row in your search list box. This button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the first row on the list.	
37.	The Next in List button displays the data for the next data row in your search list box. This button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the last row on the list.	
38.	<p>The Return to Search button returns you to the search page for the transaction type.</p> <p>Click the Return to Search button.</p> 	



Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Position Number: begins with

Description: begins with

Position Status:

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

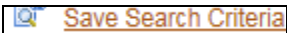
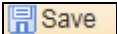
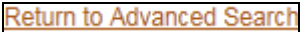
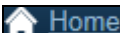
Search | Clear | Basic Search | **Save Search Criteria**

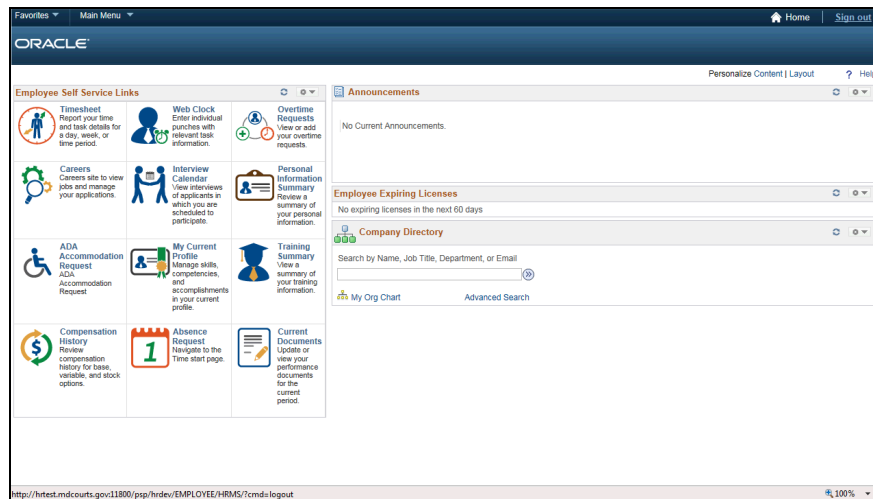
Search Results

View All | First | 1-10 of 10 | Last

Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number
59000845	HR Specialist III Approved	MDJ01	0600113	6344	59000721	
59000845	HR Specialist	Approved	MDJ01	0600113	6344	59000836
59000846	HR Specialist	Approved	MDJ01	0600113	6344	59000836
59000846	HR Specialist	Approved	MDJ01	0600113	6344	59000836
59000850	HR Specialist	Approved	MDJ01	0600113	6344	59000836
59000852	HR Specialist	Approved	MDJ01	0600113	6344	59000837
59000853	HR Specialist	Approved	MDJ01	0600113	6344	59000837
59000857	HR Specialist	Approved	MDJ01	0600113	6344	59000837

JavaScript: submitAction_win0(document.win0, '#CSaveSearch');

Step	Action	Notes
39.	<p>If the search criteria you selected is something that you think you can use again, you can save the specifics of the search.</p> <p>Click the Save Search Criteria link.</p> 	
40.	<p>The saved search will contain these values field.</p> <p>Click in the Name of Search: field.</p> <input type="text"/>	
41.	<p>Enter "Job6344" into the Name of Search: field.</p>	
42.	<p>Click the Save button.</p> 	
43.	<p>Click the Return to Advanced Search link.</p> 	
44.	<p>Notice that a Use Saved Search field appears so that you can select a saved search. Once a search has been saved, that specific search record is available for use in other search pages that use the same search record.</p>	
45.	<p>You can also delete any saved search by using the Delete Saved Search link.</p>	
46.	<p>For any of the criteria, you also can use the Case Sensitive option. This ensures that the search results are based on matching the case you enter in the criteria.</p>	
47.	<p>Click the Home link.</p> 	



Step	Action	Notes
48.	Click the Sign out link. Sign out	
49.	You have completed reviewing the Using Search Pages topic. End of Procedure.	

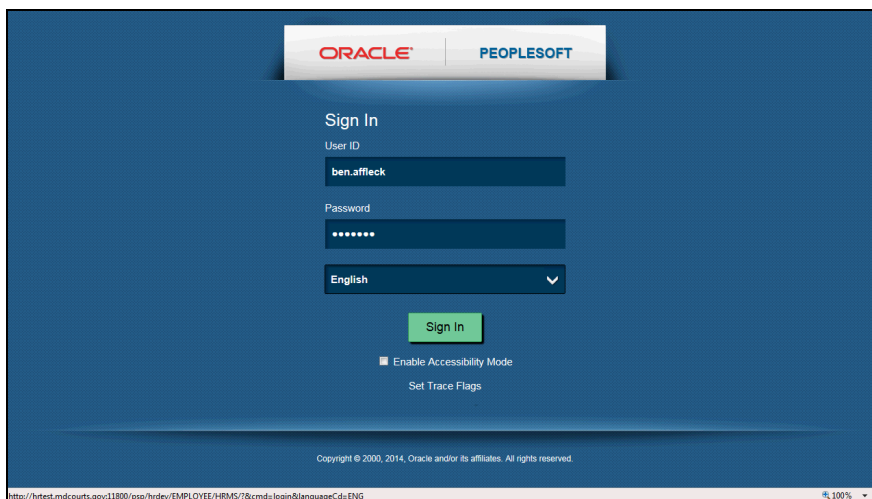
Using Operators and Wildcards

Operators enable you to conduct a search on limited amounts of information, such as first letters for names, descriptions, or IDs.

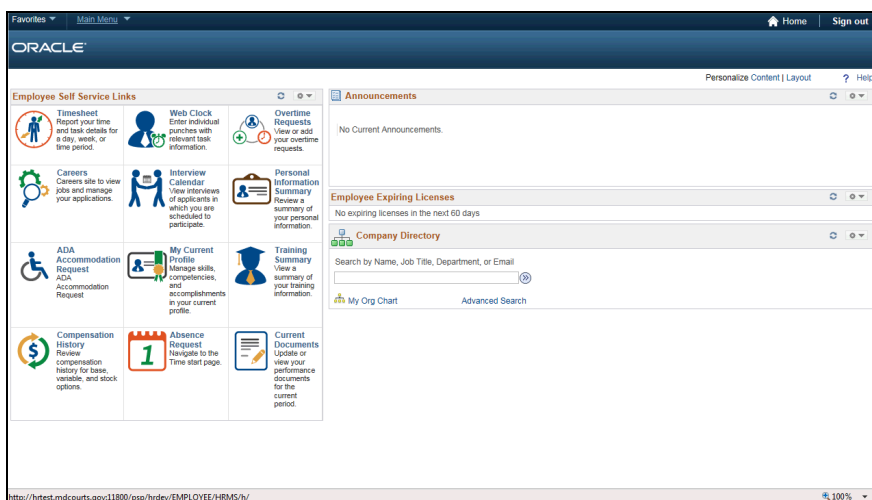
A **wildcard** is a special symbol that stands for one or more characters. This enables you to select multiple files with a single specification.

Procedure

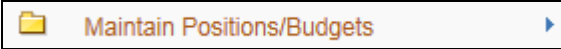

During this topic we will explain how to use operators and wildcards in search pages.

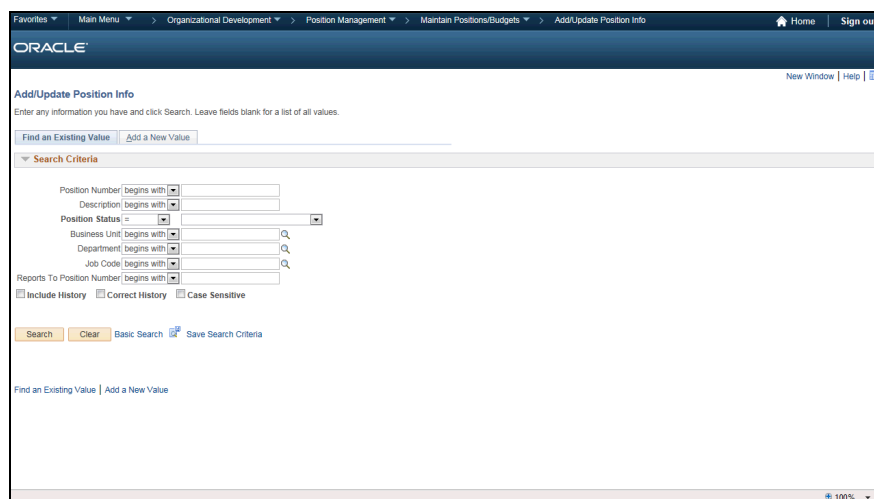


Step	Action	Notes
1.	Click the Sign In button. 	



Step	Action	Notes
2.	Click the Main Menu button. 	
3.	Click the Organizational Development menu. 	
4.	Click the scrollbar. 	

Step	Action	Notes
5.	Click the Maintain Positions/Budgets menu. 	
6.	Click the Add/Update Position Info menu. 	
7.	Operators enable you to conduct a search on limited amounts of information, such as first letters for names, descriptions, or IDs.	
8.	The fields that uniquely identify your data are called keys .	
9.	The advanced search page defaults the operators used for each search key. Notice on the search page displayed that the default for all but one of the search keys is begins with . This means that the system searches for records that match, based on the key beginning with the criteria entered in each field.	


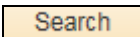
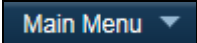





Oracle HCM Cloud interface showing the 'Add/Update Position Info' search page. The page includes a breadcrumb trail: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The page title is 'Add/Update Position Info'. Below the title, there is a search criteria section with the following fields and operators:

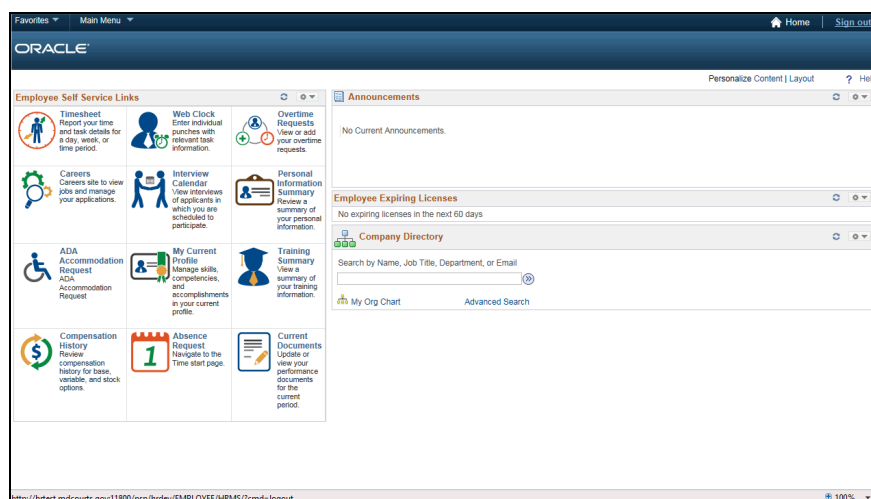
- Position Number: begins with
- Description: begins with
- Position Status: =
- Business Unit: begins with
- Department: begins with
- Job Code: begins with
- Reports To Position Number: begins with

At the bottom of the search criteria section, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. Below the search criteria, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the bottom of the page, there is a status bar showing '100%' zoom.

Step	Action	Notes
10.	Enter "59" into the Position Number field.	

Step	Action	Notes
11.	<p>In this example, you are searching for a position. You do not know the specific name of the position, but you know that it is an administrative position. If the first word in the position description was "administrative" you could use the "begins with" operator and enter the word "administrative" in the field next to the operator. This would return all positions that begin with the word "administrative." For this example, you do not know where the word falls in the description, so you need to use the "contains" operator.</p> <p>Click the Description key list to</p> 	
12.	<p>Displayed is a list of all the operators that are available when conducting a search, such as begins with, contains, equals, not equal to, greater than, greater than or equal to, less than, less than or equal to, between, and in.</p> <p>For this example select the contains list item.</p> 	
13.	<p>Click in the Description field.</p> 	
14.	<p>Enter "administrative" into the Description field.</p>	
15.	<p>Click the Search button.</p> 	
16.	<p>Your Search Results are displayed below the operators. Notice how the result only display the positions containing the word "administrative" in the description.</p>	
17.	<p>Click the Main Menu link.</p> 	
18.	<p>Click the Workforce Administration menu.</p> 	
19.	<p>Click the Job Information menu.</p> 	
20.	<p>Click the Job Data menu.</p> 	

Step	Action	Notes
21.	<p>CONNECT supports three wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process.</p> <p>The supported standard wildcard features:</p> <p>% the percent sign to match one or more characters</p> <p>_ the underscore to match any single character</p> <p>\ the back slash as an escape character (don't treat the next character as a wildcard)</p>	
22.	<p>For example, suppose you are looking for a specific employee but can't remember his ID. You know that the Name begins with "K". You can use the % wildcard to locate the employee.</p> <p>Click in the Name field.</p> <input data-bbox="266 898 557 934" type="text"/>	
23.	Enter "k%" into the Name field to search for all names beginning with the letter K.	
24.	Click the Search button.	
25.	Click the scrollbar to view all results.	
26.	Notice there are 12 employees with names beginning with the letter K.	
27.	Click the Home link.	



Step	Action	Notes
28.	Click the Sign out link. Sign out	
29.	You have completed the Using Operators and Wildcards topic. End of Procedure.	

Recognizing Page Controls

Page controls include several types of **data entry fields**, designed to offer different ways to enter and maintain information. Recognizing each type of data entry field helps you to use CONNECT more efficiently.

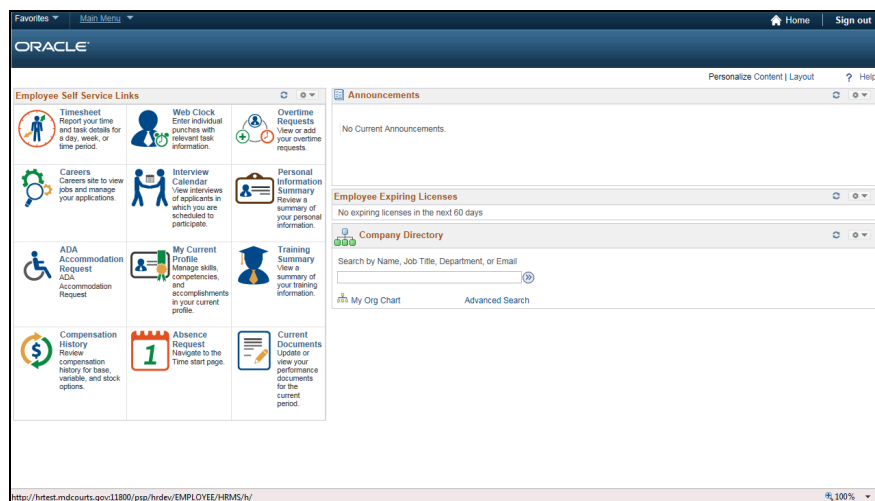
Data Entry Fields


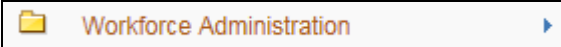
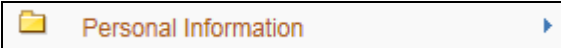


In this topic you will learn to recognize and use the different types of data entry fields such as:

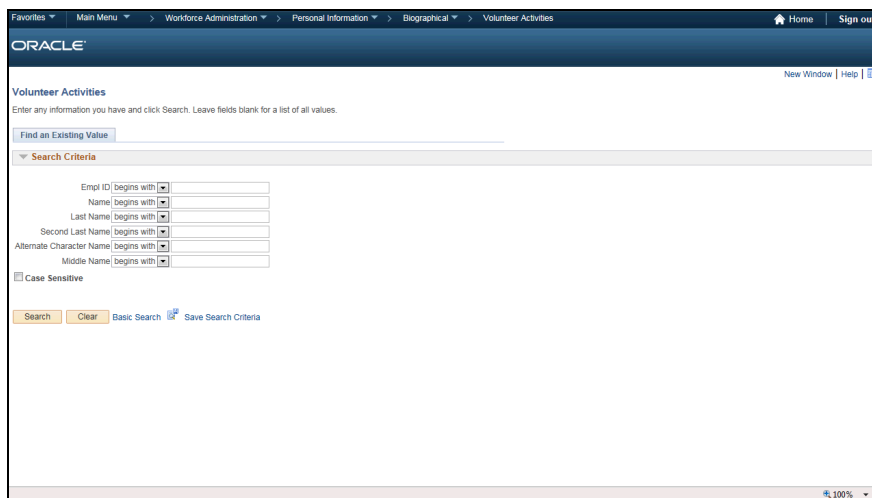
- Edit Box
- Date Prompt
- List Box
- Check Boxes
- Radio Buttons
- Long Edit Box


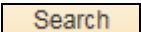
Procedure

During this topic we will identify and explain data entry fields.

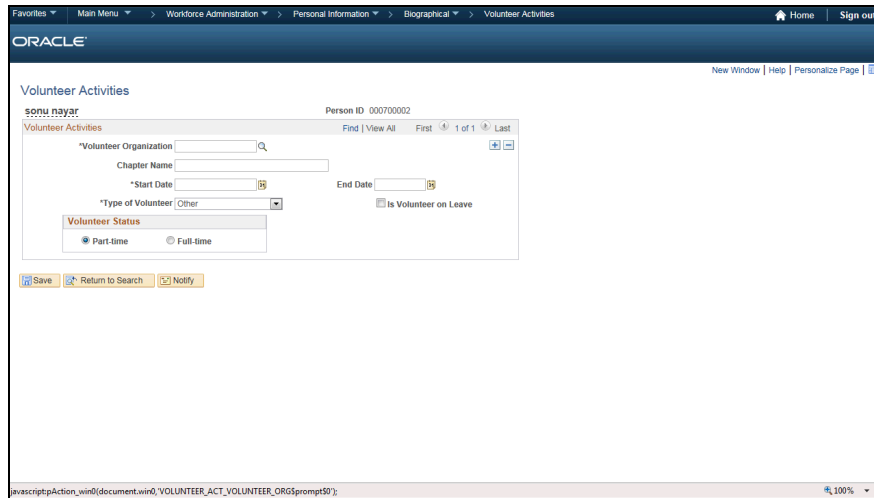




Step	Action	Notes
1.	Click the Main Menu button. 	
2.	Click the Workforce Administration menu. 	
3.	Click the Personal Information menu. 	
4.	Click the Biographical menu. 	
5.	Click the Volunteer Activities menu. 	










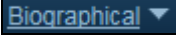
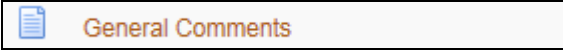
Step	Action	Notes
6.	Enter "00" into the Empl ID field.	
7.	When the Autocomplete function is enabled (My Personalizations), the system provides a list of Empl IDs based on the text you enter in the Empl ID field. Click the sonu nayar object. 	
8.	The system completed the data entry that you selected from the auto complete. Click the Search button. 	

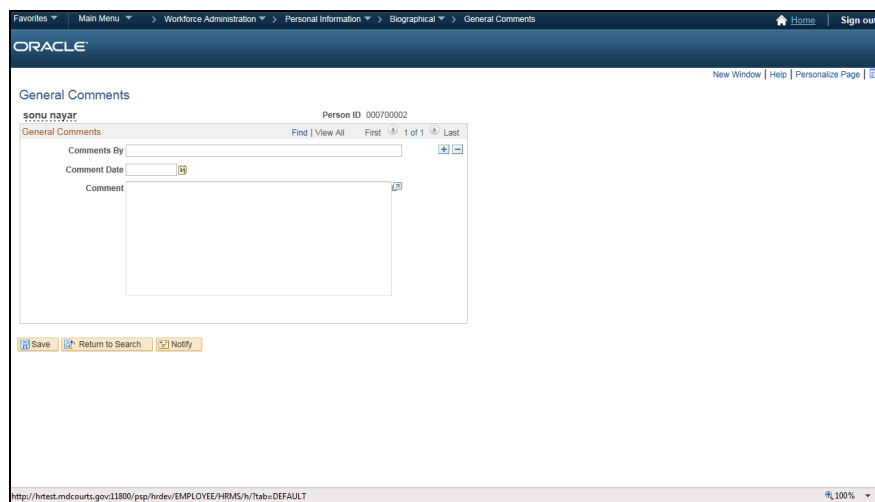
Step	Action	Notes
9.	Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The asterisks (*) next to the Volunteer Organization , Start Date , and Type of Volunteer fields indicate that these are required fields.	



Step	Action	Notes
10.	<p>An edit box with prompt button uses a Lookup button, which looks like a magnifying glass, and can be used to look up a valid value for the field. It opens a separate page that enables you to search the database for the data you need.</p> <p>Click the Look up Volunteer Organization button.</p> 	
11.	<p>A modal prompt is a child window that requires you to interact with it before you can return to operating the parent application. An example of this is the Look Up page.</p> <p>The Look Up page displays a list of all the valid values for the field. In this example, the page displays a list of all the volunteer organizations in the database.</p> <p>Click the Close button.</p> 	

Step	Action	Notes
12.	<p>When entering information in a date field, you can use the date prompt button. Clicking the button opens a small calendar that displays the current month and day. You may also enter the current day's date by typing the word "today" in a date field. When you exit the field, the system converts the word "today" to the current date in correct date format.</p> <p>Click the Choose a date button.</p> 	
13.	<p>Click the Choose Month list.</p> 	
14.	<p>For this exercise, you want to enter a start date of May 14, 2015.</p> <p>Select the May list item.</p> 	
15.	<p>Click on 14.</p> 	
16.	<p>Notice that when you selected the day, the system exited the calendar, and entered and the formatted date selected.</p>	
17.	<p>A list box is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option.</p> <p>Click the Type of Volunteer list.</p> 	
18.	<p>For this example, the type of volunteer work is Fund Raising.</p> <p>Click the Fund Raising list item.</p> 	
19.	<p>A check box is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off.</p> <p>In this example, the Is Volunteer on Leave check box option is off and you want to turn it on.</p> <p>Click the Is Volunteer on Leave option.</p> 	
20.	<p>A radio button is a small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time.</p>	

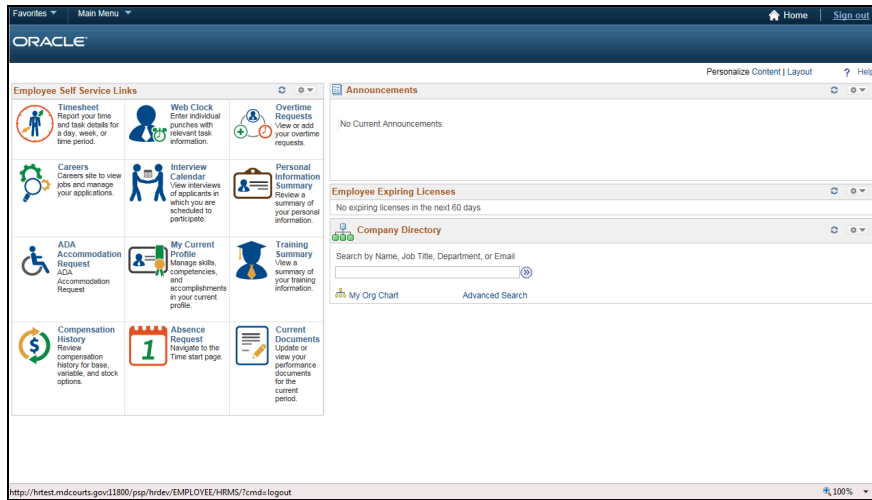
Step	Action	Notes
21.	<p>Navigate to the General Comments page, for example, to see a long edit box. In the navigation path at the top of the page, find the name of the desired menu and click to display the cascade.</p> <p>Click the Biographical button.</p> 	
22.	<p>Click the General Comments menu.</p> 	
23.	<p>An edit box is a rectangular box into which you enter data. The number of characters you can enter is determined by the length of the database field.</p>	
24.	<p>A Comment is a field into which you enter lengthy custom text, such as comments. These boxes store free-form text.</p> <p>Notice that when the edit box is empty, no scroll bar appears.</p>	
25.	<p>When you enter more lines than can be displayed at the same time in the default size of the box, the system adds a vertical scroll bar and allows you to continue entering text. Use the scroll bar to move through the text.</p>	



Step	Action	Notes
26.	<p>Click the Home link.</p> 	

TRAINING GUIDE

CONNECT HCM 9.2 Fundamentals



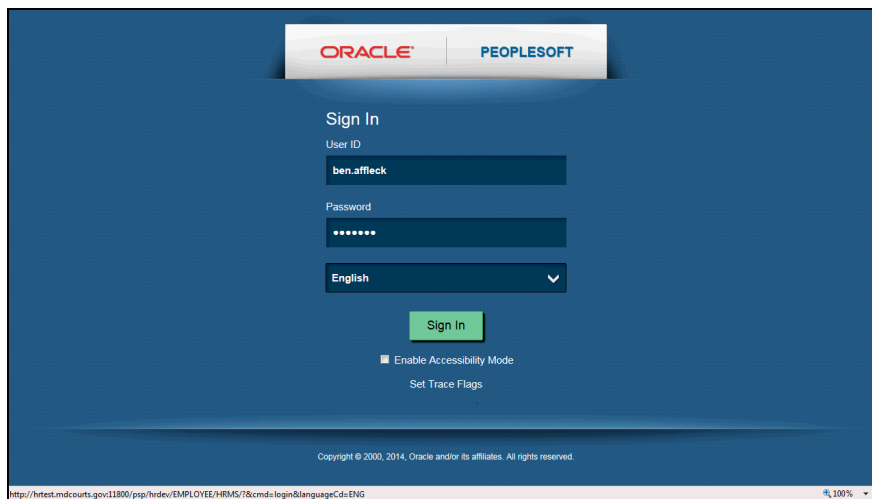
Step	Action	Notes
27.	Click the Sign out link. Sign out	
28.	You have completed the Data Entry Fields topic. End of Procedure.	

Action Buttons

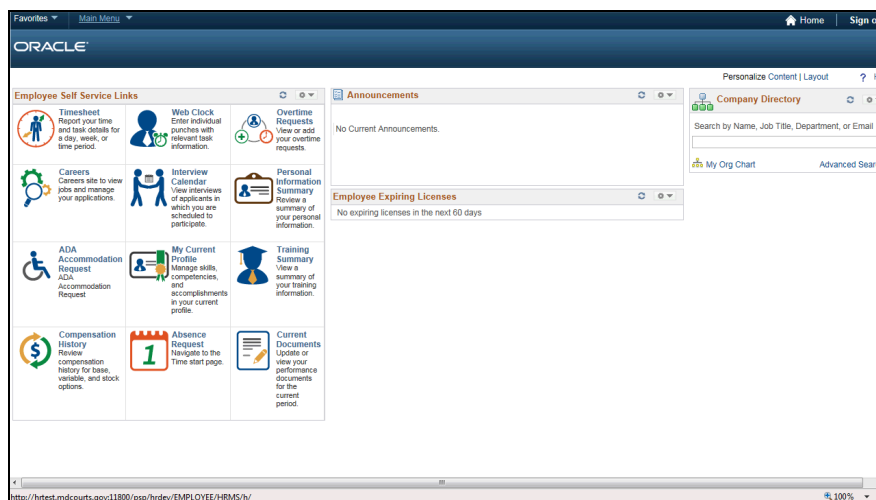
In this topic you will learn to recognize action buttons.


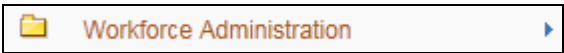


Procedure

During this topic you will review action buttons available through out CONNECT.



Step	Action	Notes
1.	Click the Sign In button. 	



Step	Action	Notes
2.	Click the Main Menu button. 	
3.	Click the Workforce Administration menu. 	
4.	Click the Job Information menu. 	
5.	Click the Job Data menu. 	
6.	Action buttons are found across the system and are visually identifiable by their graphic look. On this Job Data page you have the Search and Clear buttons.	

TRAINING GUIDE

CONNECT HCM 9.2 Fundamentals



Oracle Workforce Administration - Job Information - Job Data

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search

Search Criteria

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

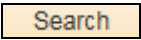
Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Include History | Correct History | Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Step	Action	Notes
7.	Click the Search button. 	
8.	Within components there are also action buttons. The Go To Row button is an example.	
9.	A plus or minus (+/-) icons allow you to add and delete data rows.	
10.	Notice the Override Position Data button is greyed out. When an action button is greyed out it is because the action is unavailable/inactive.	

Oracle Workforce Administration - Job Information - Job Data

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

sonu nayar Employee Empl ID 000700002 Empl Record 0

Find First 1 of 1 Last

Effective Date 01/01/2014

Effective Sequence 0

HR Status Active

Payroll Status Active

Position Number 59000710 Accounting Analyst

Position Entry Date 01/01/2014

Regulatory Region USA

Company MDJ

Business Unit MDJ01

Department 0452000

Department Entry Date 01/01/2014

Location C02-CTHSE

Establishment ID 242040582434

Last Start Date 01/01/2014

Expected Job End Date

Action Hire

Reason

Job Indicator Primary Job

Current

Go To Row

Override Position Data

Position Management Record

United States

Maryland Judiciary

Anne Arundel County

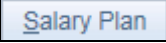
CC / ANNE ARUNDEL COURTHOUSE

Anne Arundel

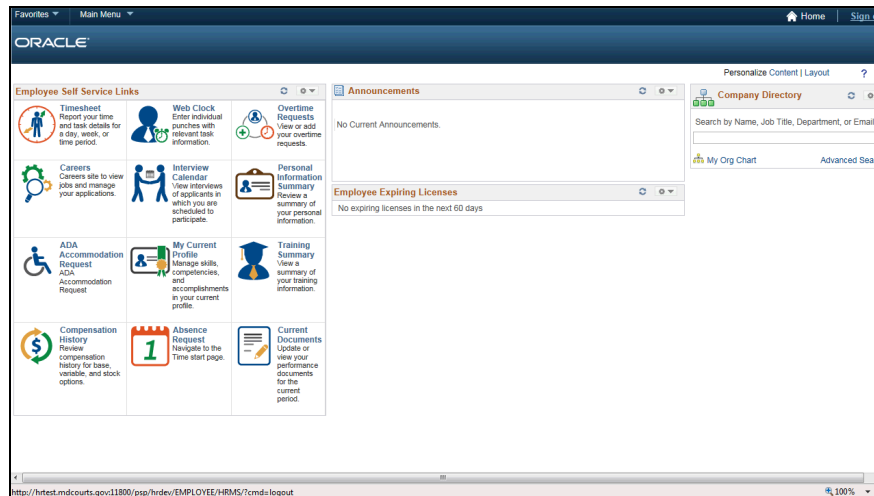
Date Created 02/19/2015

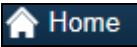

End Job Automatically

Job Data | Employment Data | Farnings Distribution | Benefits Program Participation

Step	Action	Notes
11.	Click the Salary Plan tab. 	
12.	Below the component we have a set of action buttons: Save: saves component data onto the database Return to Search: navigational button to the initial search page Notify: opens an email form to send to a notification to a selected recipient and may include a link back to the specific location/page. Refresh: reloads the page Update/Display: enables you to access current and future effective-dated rows in the database Include History: use to update certain categories of existing data in the database Correct History: used to View, Change, and Insert current and future rows (not accessible to all users) When a button is greyed out it is because it is inactive.	
13.	The Current (notepad icon) button allows you to maintain/include notes for the active record.	
14.	The Look Up (magnifying glass icon) button allows to pull up a list of options to choose from to input into the specific data field. The Refresh (two green arrows icon) button allows for the data to be refreshed/reloaded.	
15.	The Calendar (calendar icon) button, date prompt , allows to select a date by choosing a month, year, and day.	
16.	On this, Compensation page, there additional action buttons, are in the form of icons: 1. Display in other Currency icon next to the Compensation Rate. 2. Show all columns/Show tabs in the Pay Components will change view of data fields within the component. 3. Zoom (pay) component will open the component in a separate window. 4. Download (grid with red arrow pointing down) icon allows you to download the data into an Excel worksheet.	
17.	On this, Add/Update Position Information page: Previous in List: to view the previous record Next in List: to view the next record Add: a quick link to add a new record (in this example, to add a New Position)	

Step	Action	Notes
18.	<p>We navigated to the employee personal information summary page. Here you can see a set of prompt buttons:</p> <p>Edit: a pencil icon allows for editing of available information</p> <p>Delete: a trash can icon allows for removing rows of information</p>	



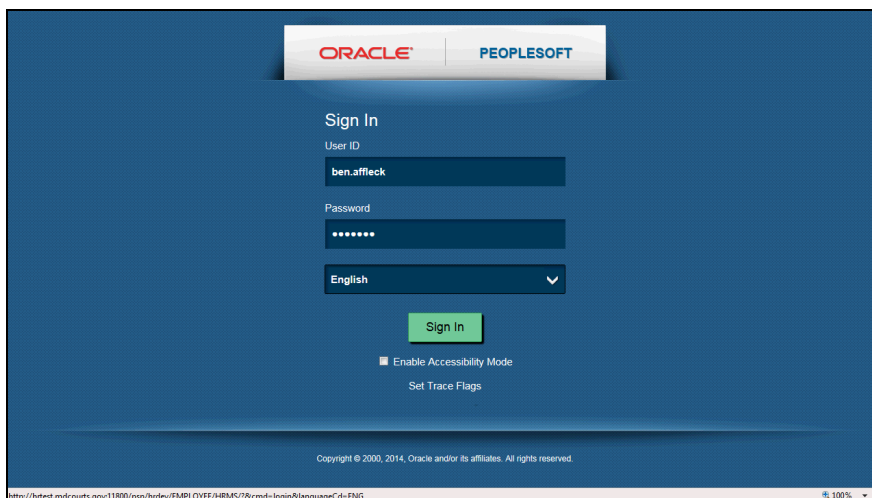
Step	Action	Notes
19.	<p>Click the Home link.</p> 	
20.	<p>Click the Sign out link.</p> 	
21.	<p>You have viewed a list of action buttons available through out CONNECT.</p> <p>End of Procedure.</p>	

Grid Page Controls for Admins


In **grids**, fields appear as columns similar to those on a spreadsheet. Fields in a grid belong to one table in your database. **Grids** enable you to visually distinguish those rows of data at a glance and to add, edit, and view multiple occurrences of data for a group of fields on a page.

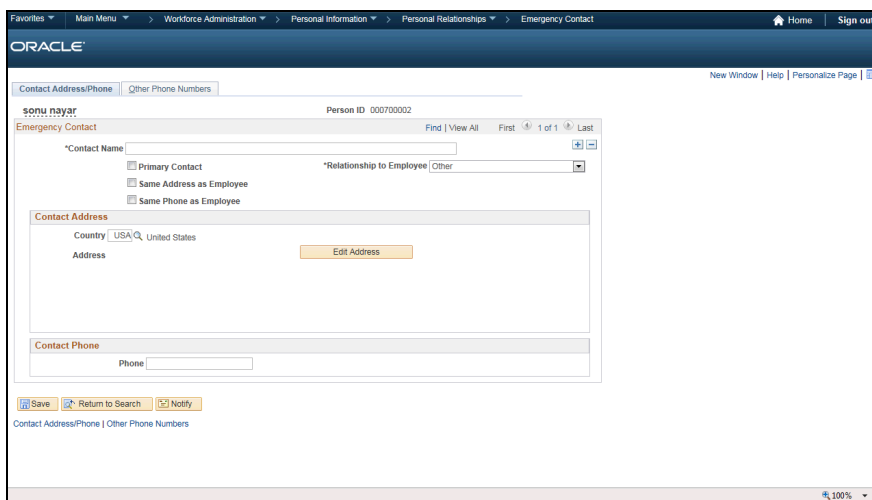
Procedure

During this topic we will review some Grid page controls.


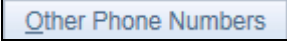


The image shows the Oracle PeopleSoft Sign In page. At the top, there are logos for ORACLE and PEOPLESFT. Below them, the text "Sign In" is displayed. There are three input fields: "User ID" with the value "ben.affleck", "Password" with masked characters "*****", and a language dropdown menu set to "English". A green "Sign In" button is located below the password field. At the bottom, there are links for "Enable Accessibility Mode" and "Set Trace Flags". The footer contains copyright information: "Copyright © 2000, 2014, Oracle and/or its affiliates. All rights reserved." and a URL: "http://hrtest.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/7B/crmds:login@languageCd=ENG".

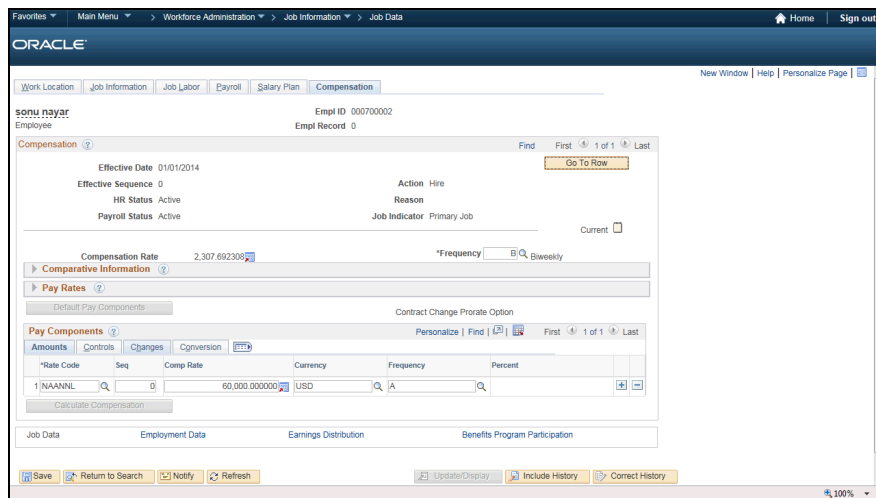
Step	Action	Notes
1.	Click the Sign In button. 	
2.	For this example we will view the Contact Address/Phone page.	
3.	This is an employee Contact Address/Phone page.	



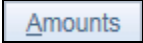
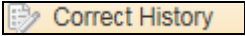


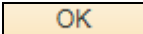


The image shows the Oracle PeopleSoft Contact Address/Phone page. The top navigation bar includes "Favorites", "Main Menu", "Workforce Administration", "Personal Information", "Personal Relationships", and "Emergency Contact". The page title is "Contact Address/Phone" with a sub-tab "Other Phone Numbers". The main content area shows the "Emergency Contact" section for a person with ID "000700002". There are fields for "Contact Name", "Primary Contact", "Same Address as Employee", "Same Phone as Employee", and "Relationship to Employee". Below this is the "Contact Address" section with fields for "Country" (USA) and "Address". At the bottom, there is a "Contact Phone" section with a "Phone" field. The page includes "Save", "Return to Search", and "Notify" buttons. The footer shows the URL "http://hrtest.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/7B/crmds:login@languageCd=ENG".


Step	Action	Notes
4.	<p>Employee names are displayed with a dashed underline which indicates the availability of a mouse over popup page.</p> <p>Click the sonu nayar object.</p> 	
5.	<p>When you click or mouse over the employee name, additional information about an employee appears in a popup window. The popup window disappears when you move the mouse away.</p>	
6.	<p>The Other Phone Numbers page in the Emergency Contact component contains a grid area.</p> <p>Click the Other Phone Numbers tab.</p> 	
7.	<p>On some pages, you may want the fields to repeat in order to enter multiple rows of data.</p> <p>Grids look similar to a spreadsheet with column headings, rows, and cells. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.</p>	
8.	<p>Rows of data in grids always share the same high-level keys. For example, for the Other Phone Numbers page, you can have multiple rows for the different phone types. If you have multiple rows, each of these rows has the same Person ID as the key field. If you insert a new row, the system automatically copies the shared key data into the new row.</p>	
9.	<p>Instead of using a traditional scrollbar to scroll through the rows of data in a grid, CONNECT uses navigation buttons and hyperlinks. Most often, you will find these buttons and hyperlinks in the navigation header for each area, with the exception of the Insert Row and Delete Row buttons.</p>	
10.	<p>Use the Find link to find a specific row of data.</p>	
11.	<p>Use the View All link to display all rows of data on a page. When this feature is enabled, the link changes to read View 1, so that you can return to the original setting.</p>	
12.	<p>The First link takes you to the first row of data.</p>	
13.	<p>Use the Previous Row arrow to navigate to the previous row of data.</p>	

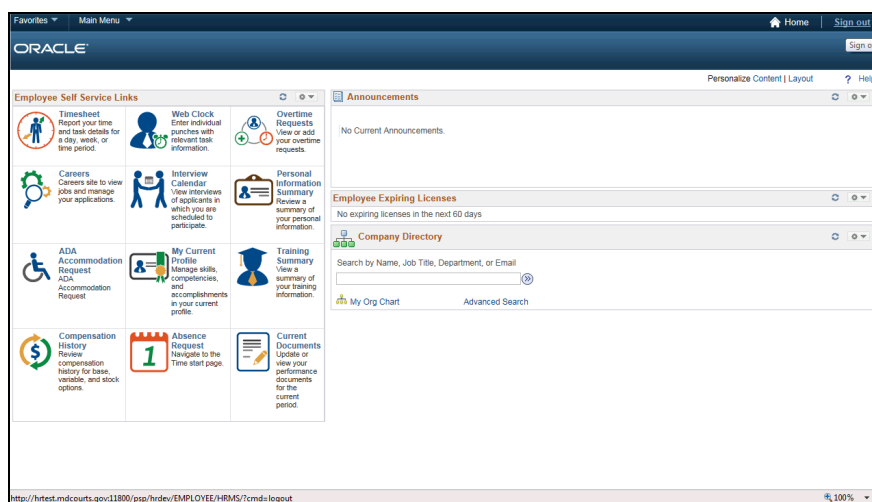
Step	Action	Notes
14.	The number system for the rows shows the number of rows you are currently viewing. In this example we 1 of 1 Emergency Contact.	
15.	In the Other Phone Numbers for Emergency Contact, notice the display is now 1-3 of 3 phone numbers.	
16.	Use the Next Row arrow to navigate to the next row of data.	
17.	The Last link takes you to the last row of data.	
18.	The Add Row button inserts a new row of data.	
19.	The Delete Row button deletes the current row of data.	
20.	For this example, we navigated to the Compensation page in the Job Data component for you (see the navigation path at the top of the page for navigation).	




Step	Action	Notes
21.	<p>Another type of grid is a tabbed grid. These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them.</p> <p>Here you can see a tabbed grid section. You select a tab to view the additional columns.</p> <p>Click the Changes object.</p> <div data-bbox="360 1749 505 1791" data-label="Text"> <p>Changes</p> </div>	

Step	Action	Notes
22.	<p>Notice that different columns are displayed.</p> <p>Click the Amounts object.</p> 	
23.	<p>To add data on this page, you must use Correct History.</p> <p>Click the Correct History button.</p> 	
24.	<p>Notice that the number system for the rows in the grid navigation header shows 1 of 1.</p>	
25.	<p>To add a new row of data to a grid, you click the Add Row button to insert a row just below the row you are on. Each time you add a new row, you are actually adding a new row of data to the database table.</p> <p>Click the Add a new row link.</p> 	
26.	<p>A new row is now available. Notice that the number system for the rows in the grid navigation header now shows 1-2 of 2.</p>	
27.	<p>If you want to delete a row, click the Delete Row button.</p> <p>Click the Delete row link.</p> 	
28.	<p>The system displays a confirmation message asking if you want to proceed with the deletion. It also reminds you that the row will not be deleted from the database until you save the page; however, the row is automatically removed from the grid.</p> <p>Click the OK button.</p> 	
29.	<p>You may also encounter grids that can be collapsed or expanded. By clicking the right pointing arrow in front of the grid heading, you can expand a grid that is hidden from view or collapsed.</p> <p>Click the Expand section link.</p> 	
30.	<p>You can collapse the grid by clicking the down arrow in front of the grid heading.</p> <p>Click the Collapse section button.</p> 	

Step	Action	Notes
31.	Remember to Save the page to apply corrections/changes.	
32.	You have completed this topic. Click the Home link.  Home	



Step	Action	Notes
33.	Click the Sign out link. 	
34.	You have successfully used the grid page controls with multiple rows of data. End of Procedure.	

Grid Page Controls for Employees

In **grids**, fields appear as columns similar to those on a spreadsheet. Fields in a grid belong to one table in your database. **Grids** enable you to visually distinguish those rows of data at a glance and to add, edit, and view multiple occurrences of data for a group of fields on a page.

Procedure

During this topic you will review the grid page controls.

TRAINING GUIDE


CONNECT HCM 9.2 Fundamentals

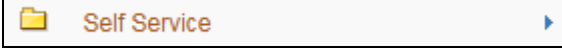



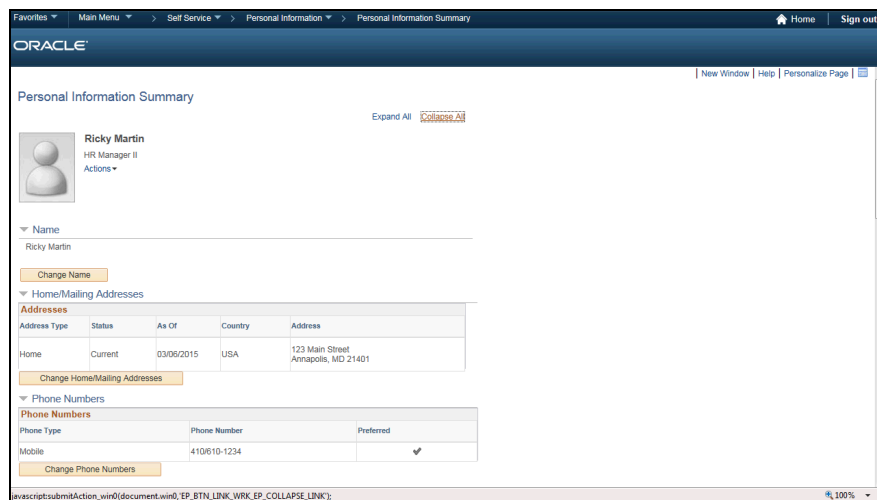
The screenshot shows the Oracle PeopleSoft Sign In page. At the top, there are logos for ORACLE and PEOPLESFT. Below them is a 'Sign In' section with fields for 'User ID' (containing 'ricky.martin'), 'Password' (masked with dots), and a language dropdown set to 'English'. A green 'Sign In' button is located below these fields. At the bottom of the sign-in section, there are links for 'Enable Accessibility Mode' and 'Set Trace Flags'. The footer contains copyright information: 'Copyright © 2000, 2014, Oracle and/or its affiliates. All rights reserved.' The browser address bar at the bottom shows a URL starting with 'http://hrtest.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/7&cmd=login&languageCd=ENG'.



Step	Action	Notes
1.	Click the Sign In button. 	



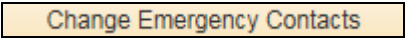
The screenshot shows the Oracle PeopleSoft Main Menu page after a successful login. The top navigation bar includes 'Favorites', 'Main Menu', 'Home', and 'Sign out'. The main content area is divided into several sections: 'Employee Self Service Links' (containing links like Timesheet, Web Clock, Overtime Requests, Careers, Interview Calendar, Personal Information Summary, ADA Accommodation Request, My Current Profile, Training Summary, Compensation History, Absence Request, and Current Documents), 'Employee Expiring Licenses' (showing no expiring licenses), 'Announcements' (showing no current announcements), and 'Direct Reports Phones' (a table listing phone numbers for Faith Bagnall, Gigi Mathews, and Linda McCabe). The browser address bar at the bottom shows a URL starting with 'http://hrtest.mdcourts.gov:11800/psp/hrdev/EMPLOYEE/HRMS/h/...'.

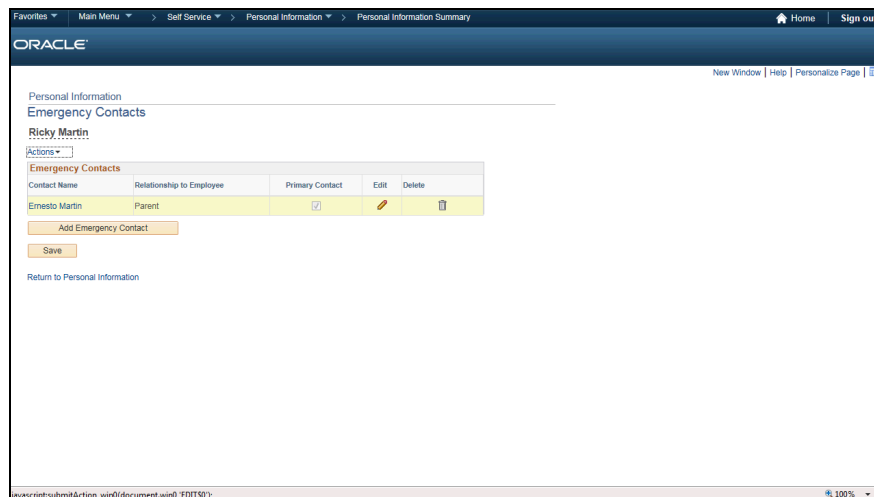
Step	Action	Notes
2.	To navigate CONNECT you have the cascading Main Menu. For this example let's look at the main menu navigation to the Personal Information Summary page. Click the Main Menu button. 	


Step	Action	Notes
3.	Click the Self Service menu. 	
4.	Click the Personal Information menu. 	
5.	This is the path to access the Personal Information Summary page using the main menu. This page is part of the Self-Service component for employee transactions.	
6.	On the home page we also include an Employee Self-Service Links pagelet for easy access to employee commonly used pages.	
7.	Click the Personal Information Summary link.	
8.	Personal Information Summary page contains all the personal information available for the employee. This page includes: Name, Home/Mailing Address, Phone Numbers, Emails, etc.	
9.	All section details are displayed by default. To be able to view all section titles we will need to collapse them.	

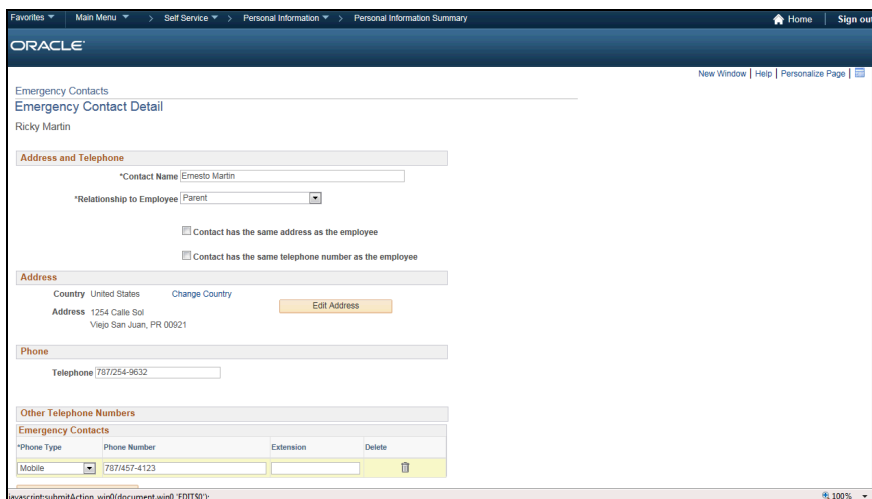


Step	Action	Notes
10.	Click the Collapse All link to view section titles only. 	
11.	Notice how all the sections are now collapsed and we are able to see them quickly.	
12.	To view the contents of a section click the Expand section button. 	

Step	Action	Notes
13.	Click the Expand section link. 	
14.	To hide the contents of a section click the Collapse section link. 	
15.	You can always use the Expand All or Collapse All links.	
16.	Grids look similar to a spreadsheet with column headings , rows , and cells . The cells are equivalent to fields.	
17.	For this example we will make some changes to the Emergency Contacts. Click the Change Emergency Contacts button. 	
18.	Fields within a grid may be represented as edit boxes, list box, check box, and radio button or prompt button (for example: pencil and trash can icons).	



Step	Action	Notes
19.	To edit the details of the emergency contact click the Edit button. 	
20.	Now in the Emergency Contact Detail page, notice how the information previously provided is displayed. For this example we will make an edit to the phone number.	



Emergency Contacts
Emergency Contact Detail
Ricky Martin

Address and Telephone

*Contact Name Ernesto Martin

*Relationship to Employee Parent

☐ Contact has the same address as the employee

☐ Contact has the same telephone number as the employee

Address


Country United States Change Country



Address 1254 Calle Sol
Viejo San Juan, PR 00921

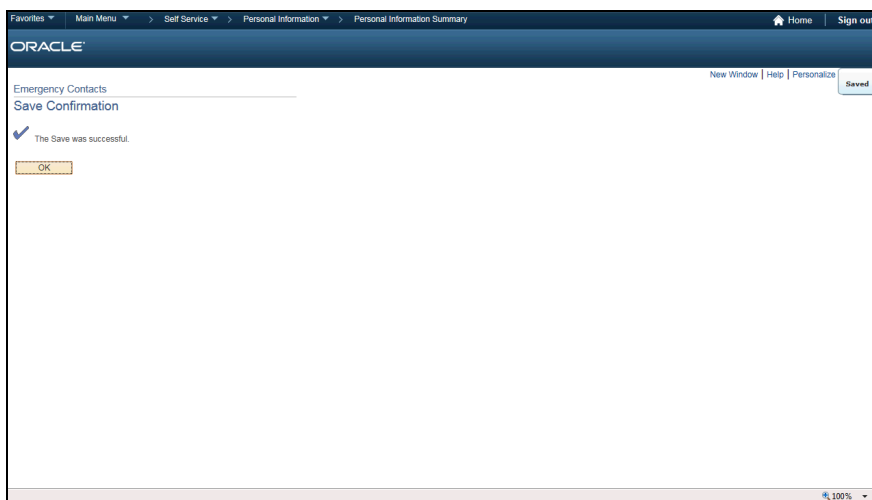
Phone

Telephone 787/254-9632


Other Telephone Numbers


*Phone Type	Phone Number	Extension	Delete
Mobile	787/457-4123		

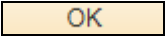
Step	Action	Notes
21.	Click in the Phone Number field. 	
22.	The last digit is incorrect. Press [Backspace] to delete.	
23.	Enter "4" .	
24.	Scroll down to the bottom of the page.	
25.	Click the Save button. 	
26.	Most transactions are processed quickly, but the system will always display a Saving... or Saved message on the top right corner to let you know what is happening.	

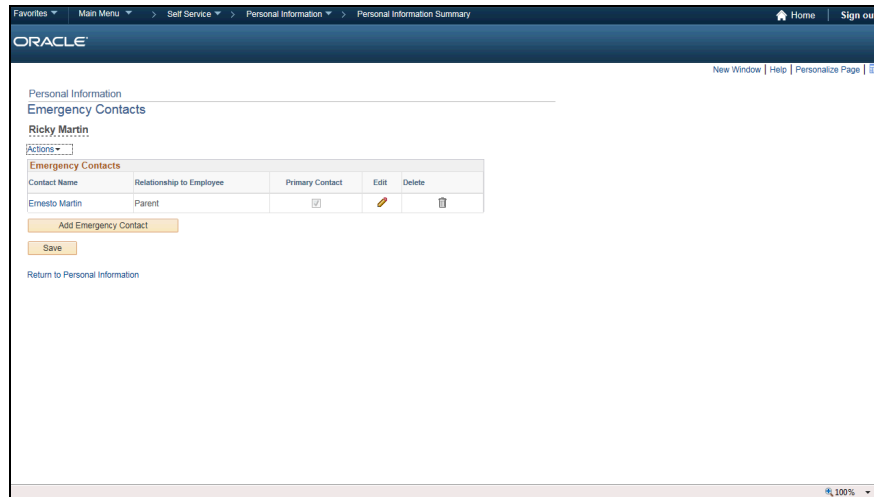


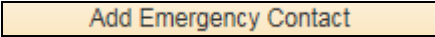
Emergency Contacts
Save Confirmation

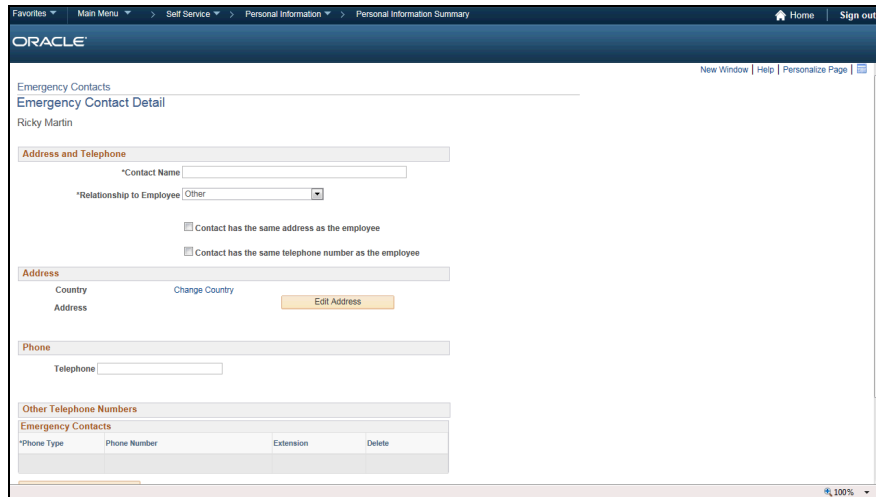
 The Save was successful.



Step	Action	Notes
27.	<p>A save confirmation message indicates the edit was successfully saved. Click the OK button.</p> 	



Step	Action	Notes
28.	<p>For this next example we will add a new emergency contact.</p> <p>Click the Add Emergency Contact button.</p> 	
29.	<p>Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The asterisks (*) next to the Contact Name, Relationship to Employee, and Phone Type fields indicate that these are required fields.</p>	



Emergency Contacts
Emergency Contact Detail
Ricky Martin

Address and Telephone

*Contact Name

*Relationship to Employee

☐ Contact has the same address as the employee

☐ Contact has the same telephone number as the employee

Address

Country Change Country



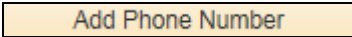



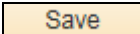
Address

Phone

Telephone

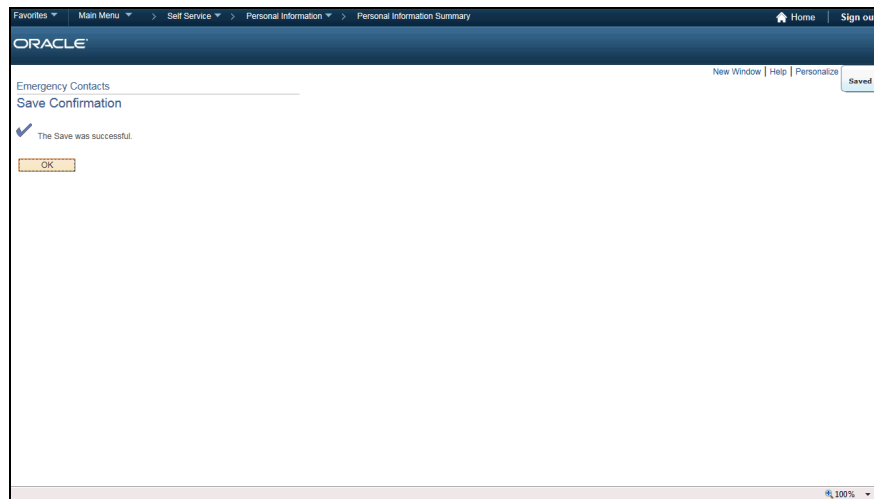
Other Telephone Numbers

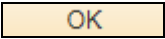
*Phone Type	Phone Number	Extension	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="X"/>

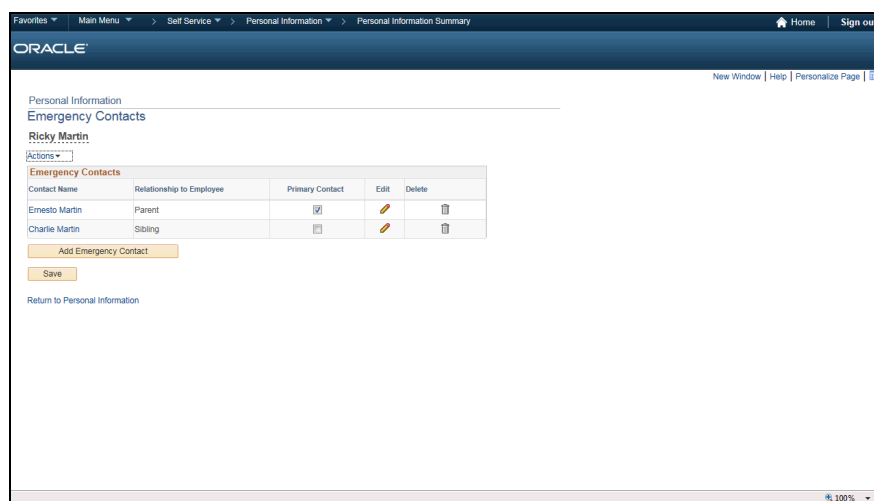
Step	Action	Notes
30.	Click in the Contact Name field.	
31.	Enter " Charlie Martin " into the Contact Name field.	
32.	To view and select from the predefined list of options click the Relationship to Employee list box. 	
33.	List menus will display all options available in the system. Click the Sibling list item. 	
34.	Click to scroll down to the bottom of the page.	
35.	Click the Add Phone Number button. 	
36.	Notice the Phone Type field includes an asterick (*) indicating it is a required field. Click the Phone Type list menu. 	
37.	Click the Mobile list item. 	
38.	Click in the Phone Number field. 	
39.	Enter " 787-743-9438 " into the Phone Number field.	
40.	Click the Save button. 	

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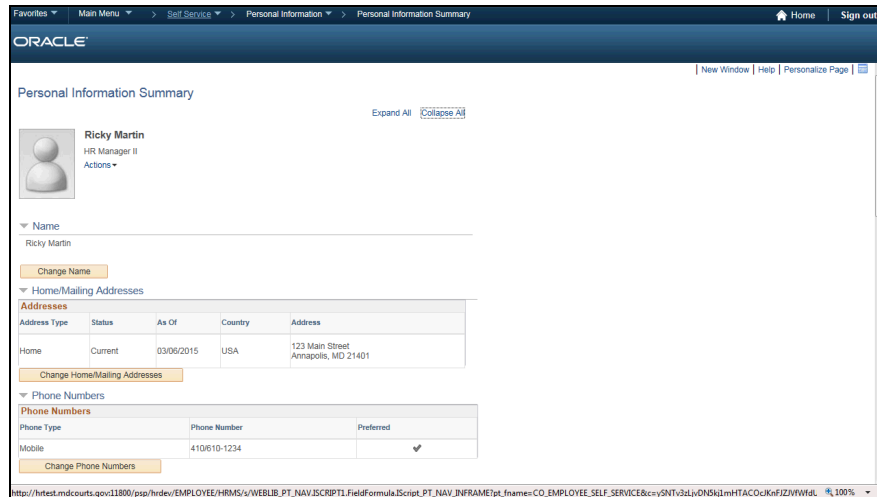


Step	Action	Notes
41.	Click the OK button. 	
42.	Notice now there are two emergency contacts available. You may choose to change the Primary Contact here by selecting the check box and then saving the change. A check box is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off.	

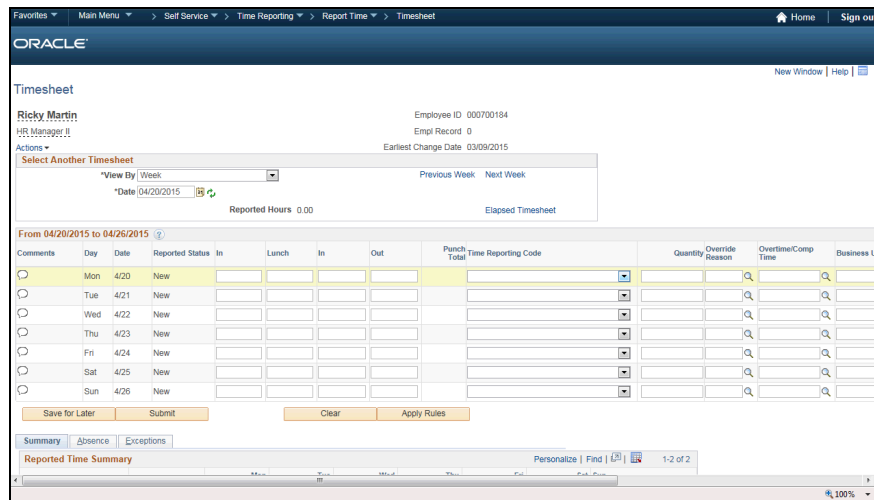




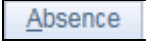
Step	Action	Notes
43.	Click the Save button. 	



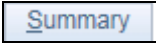

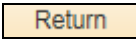


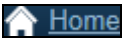
Step	Action	Notes
44.	Click the Return to Personal Information link to return to that page. Return to Personal Information	



Step	Action	Notes
45.	We use the navigation path to navigate to the timesheet page. Click the Self Service button. Self Service	
46.	Click the Time Reporting menu. Time Reporting	
47.	Click the Report Time menu. Report Time	
48.	Click the Timesheet menu. Timesheet	
49.	There are various types of timesheets and your timesheet may be different than the one used for this example, which is a Punch Time timesheet.	
50.	Notice there are required fields by the use of the asterisk (*). Also, notice the structure of the fields is based on a grid with columns and rows.	
51.	For this week the punch time timesheet provides a Comments, In, Lunch, In, Out, etc. data fields per day of the week. Each day is in its own data row .	

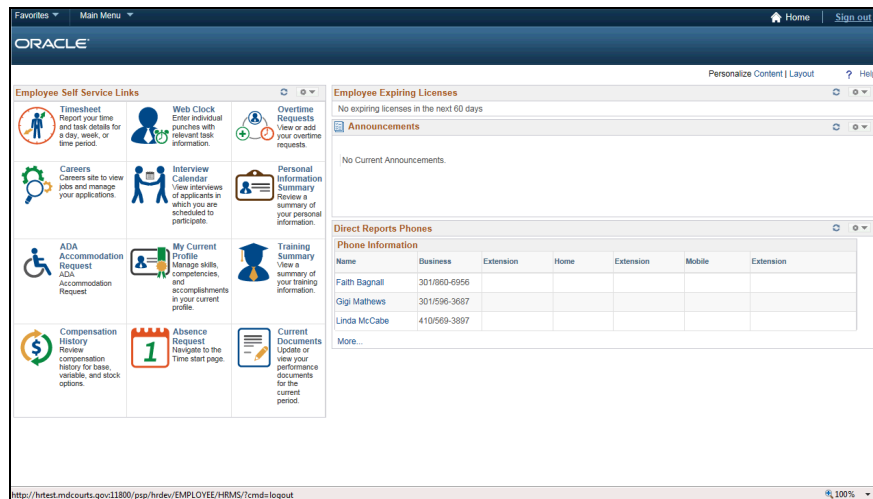


Step	Action	Notes
52.	Click the Time Reporting Code list box. 	
53.	A list box is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option. Click the Time Reporting Code list. 	
54.	An edit box with prompt button uses a Lookup button, which is a magnifying glass icon, and can be used to look up a valid value for the field. It opens a modal prompt window that enables you to search the database for the data you need.	
55.	At the end of each row there are Add a Row (+) and Delete a Row (-) buttons.	
56.	Click to scroll the page left.	
57.	Click the bar to scroll down to the bottom of the page.	
58.	Below the timesheet you have view access to the Reported Time Summary, Absence and Exceptions details. Another type of grid is a component tab menu . These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them.	
59.	Click the Absence tab. 	
60.	Notice that different columns are displayed.	

Step	Action	Notes
61.	Anytime there is a question mark (?) next to a section, this is embedded help , there is more information available to help you understand what that section is about. Click the Help button. 	
62.	Click the Close button. 	
63.	Click the Summary tab. 	
64.	Use the Zoom button to view the section in a separate window. Click the Zoom Reported Time Summary link. 	
65.	Click the Return button. 	
66.	Click to scroll to the top of the page.	
67.	A dashed underline indicates availability of a mouse over popup page. Click the Ricky Martin object. 	
68.	When you click or mouse over the additional information about an employee appears in a popup window. The popup window disappears when you move the mouse away.	
69.	You may have additional actions link that are accessible here. Click the Actions link. 	
70.	You have completed the review of Grid Page Controls. Click the Home link. 	

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Step	Action	Notes
71.	Click the Sign out link. Sign out	
72.	You have successfully completed the review of Grid Page Controls for Employees. End of Procedure.	

Adding and Updating Data

The ability to manipulate existing data within CONNECT is paramount to keeping accurate records. Using effective-dated tables in combination with action types is essential to being able to do this.

Upon completion of this lesson, you will be able to:

- Understand action types.
- Understand effective-dated rows.

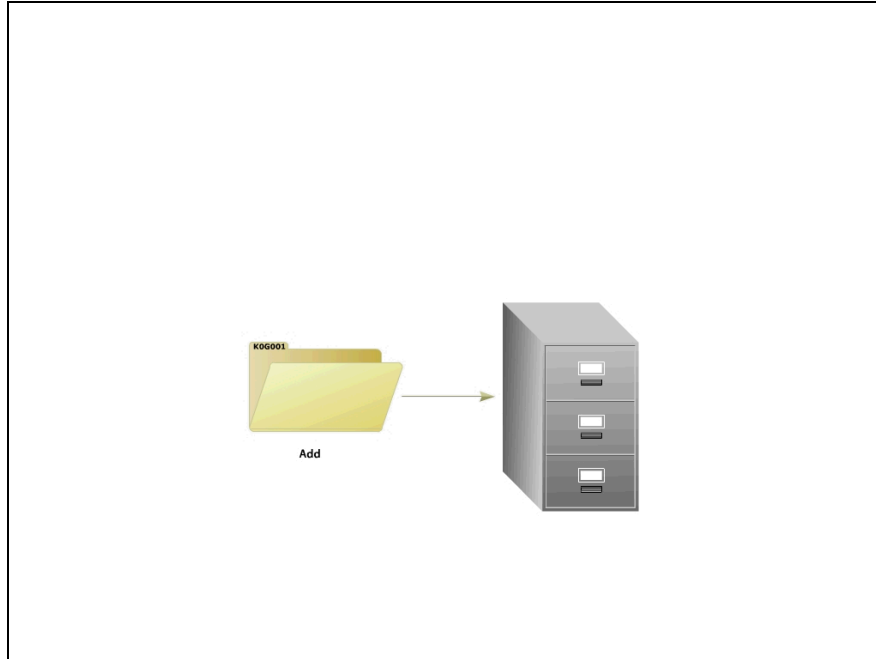
Understanding Action Types

Action types are essential to accessing data within CONNECT. The four action types are:

- Add
- Update/Display
- Update/Display All
- Correction

Procedure

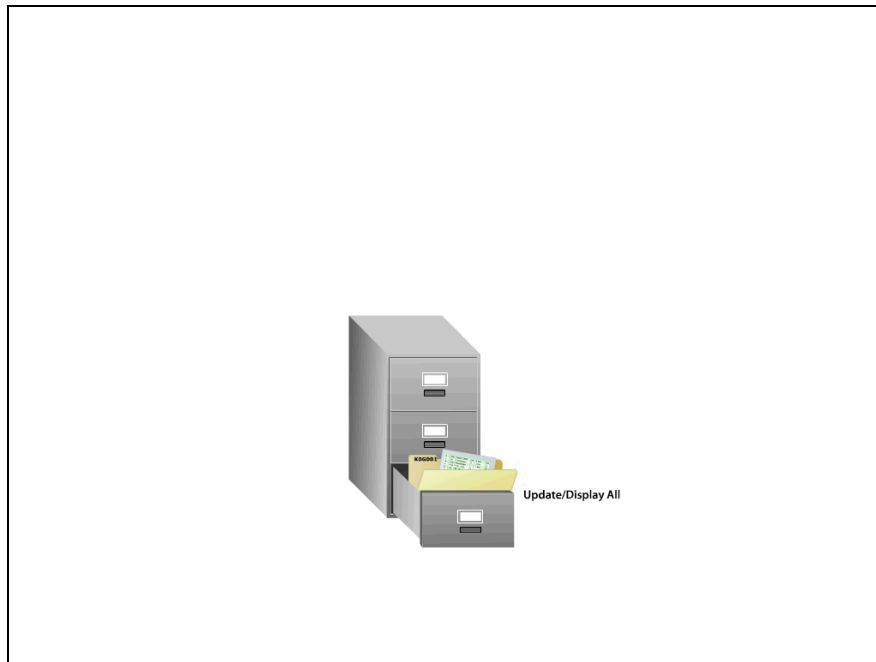
During this topic we will review Action Types.



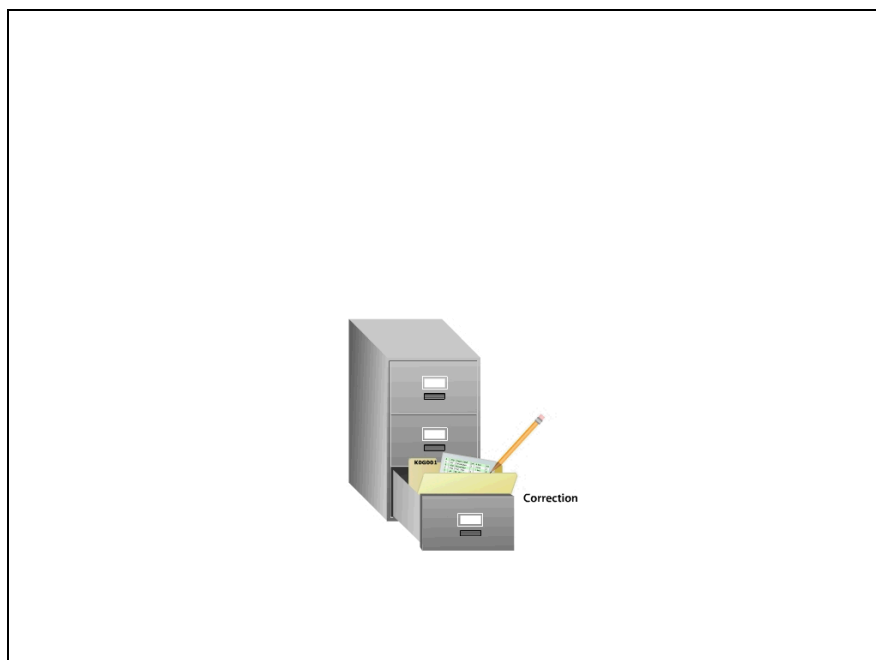
Step	Action	Notes
1.	<p>Imagine the file cabinet graphic below is a CONNECT database. The file cabinet is filled with information categorized by folders. When you use the Add action type, you create a new folder, such as file KOG001 below.</p> <p>Susan Jones has just been hired by your organization and has been assigned Employee ID KOG001. This ID is now the high-level key used to differentiate Susan Jones from Arnold Jones, who is also employed within the company.</p>	



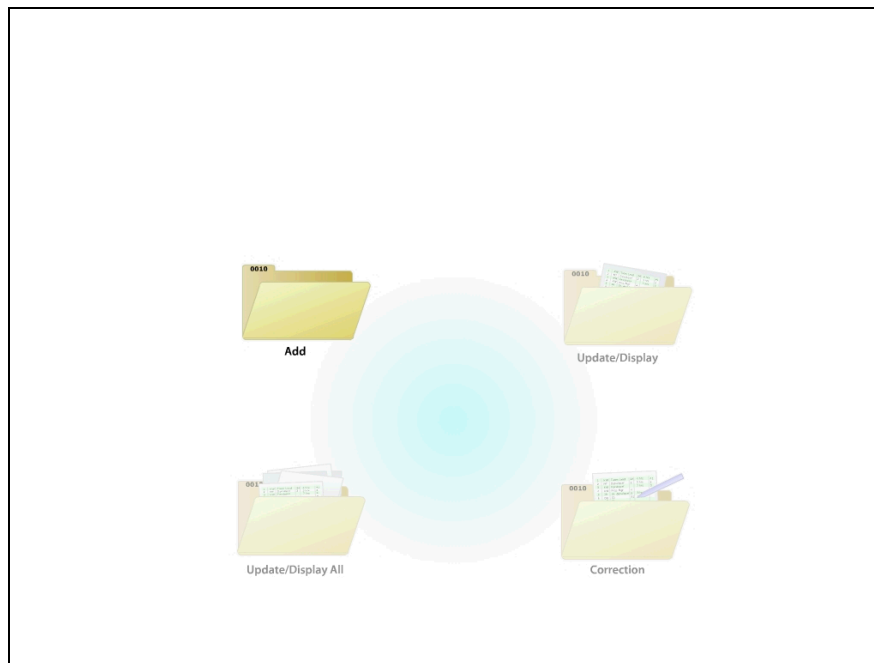
Step	Action	Notes
2.	Susan has now been hired and assigned a CONNECT Employee ID. She has additional personal information to be added to her records. To access her employee file, the action type of Update/Display is used. As its name describes, the action Update/Display enables you to make updates to existing data or to display current data.	



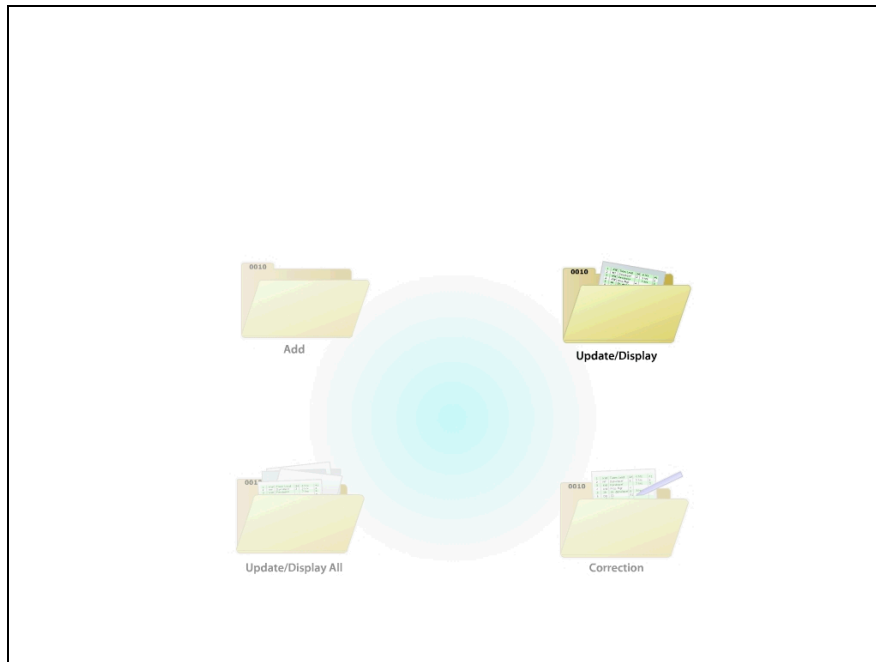
Step	Action	Notes
3.	Three years have passed since Susan was hired. In that time, she has changed jobs, moved twice, and gotten married. You can use the action type Update/Display All to view previously entered (historical) data, in addition to current accessible rows using Update/Display.	



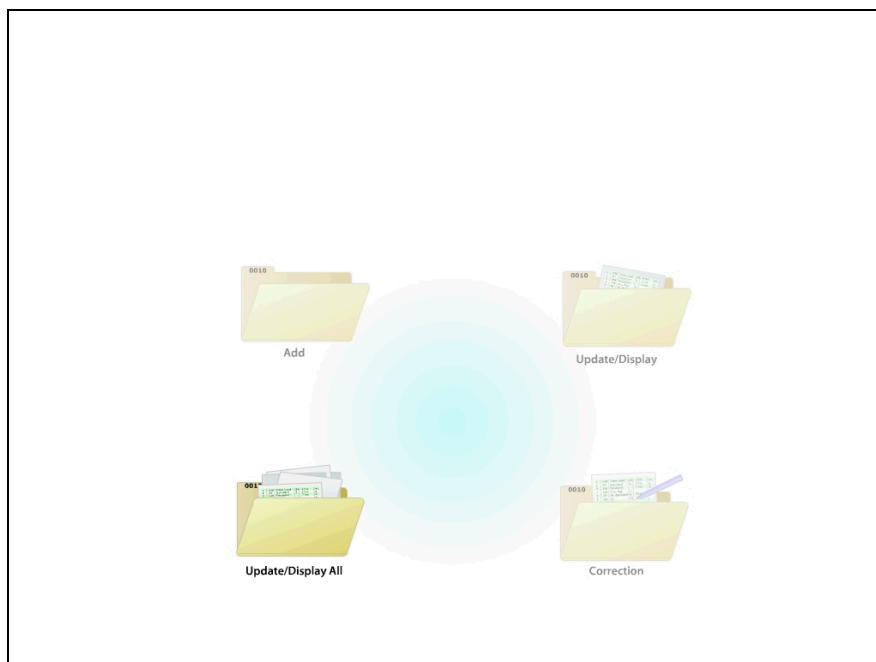
Step	Action	Notes
4.	It was recently discovered that an error was made when Susan transferred departments. You can use the action type Correction to make adjustments to errors in the database. The Correction action type is a powerful tool, and not all users have access to it because of the ability to delete or modify any row of data within the database.	



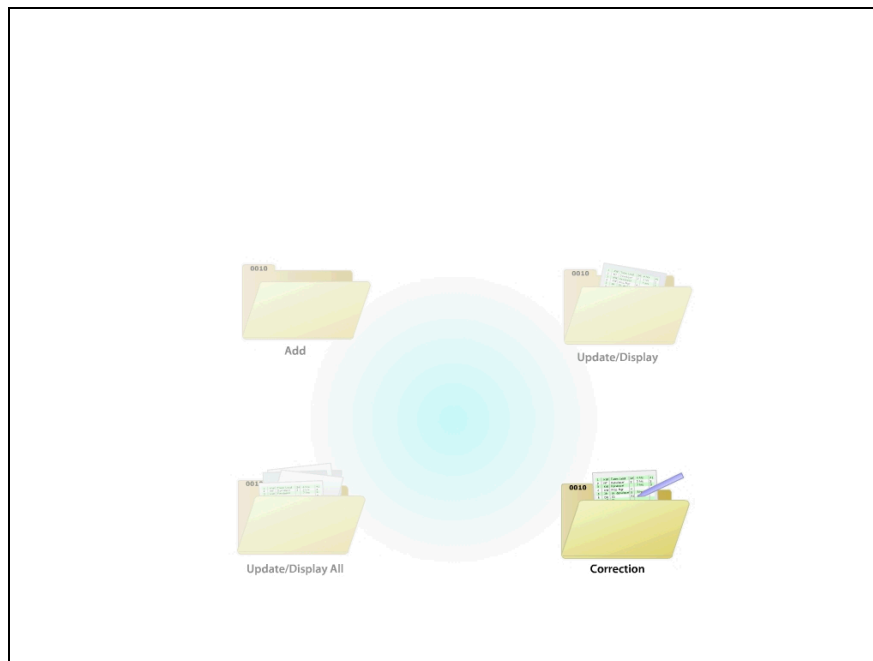
Step	Action	Notes
5.	You use four action types to work with data in CONNECT. You use Add when a new high-level key is required to complete a transaction.	



Step	Action	Notes
6.	Update/Display is used when retrieving or updating data on non-effective-dated database tables. If the table is effective-dated, you can use this action to view current and future rows; modify future rows only; insert a new current row or future row.	



Step	Action	Notes
7.	When you view data using Update/Display All , you will view current, future, and history rows of data. This is helpful when you want to view historical data.	



Step	Action	Notes
8.	Correction is the most powerful of all the actions. You can use it to view, change, or insert rows of data, regardless of the effective date.	
9.	You have completed reviewing the Action Types topic. End of Procedure.	

Effective-Dated Rows

CONNECT uses **effective-dated** rows to retain historical data, view data changes over time, and store future data. Three categories of effective-dated rows are used to accomplish this task:

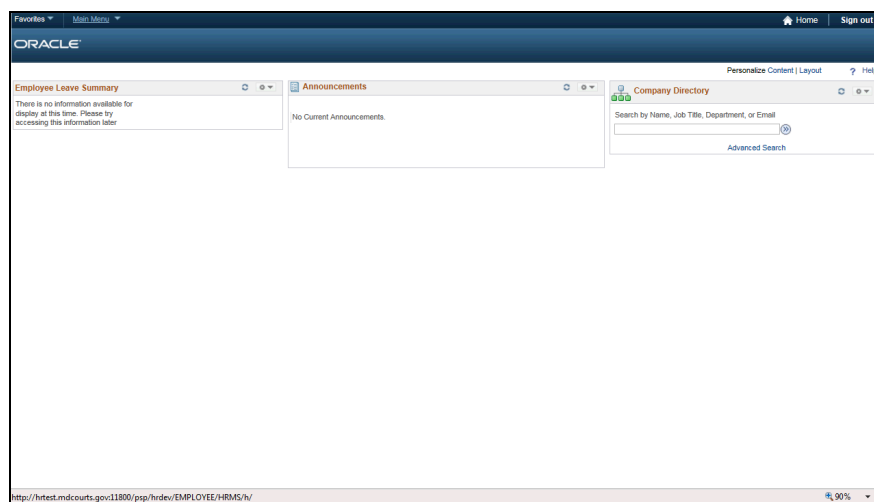
- Current
- Future
- History


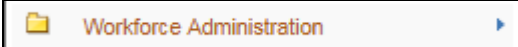


Procedure

During this topic we will review the categories of effective-dated rows.

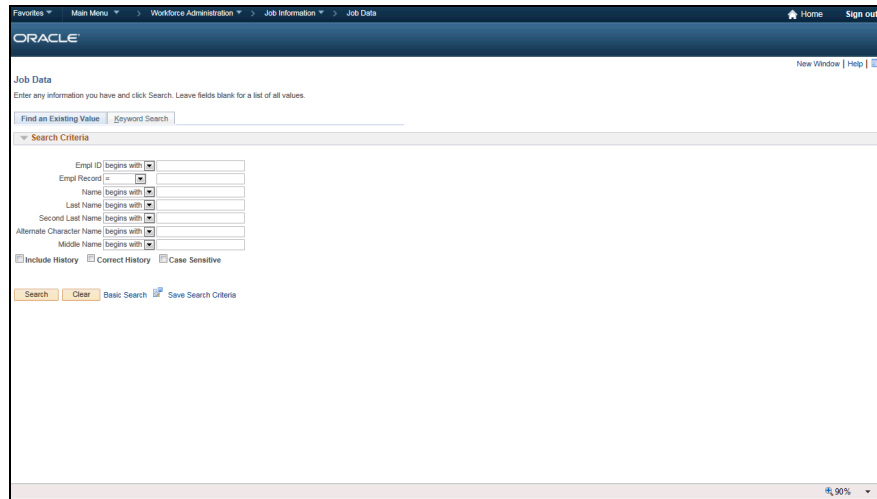
Step	Action	Notes
1.	Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of John Smith: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, and significant dates, you can build a job history.	
2.	<p>A current row of data within CONNECT displays the most up-to-date information available, or what is currently affecting a change to the data.</p> <p>John Smith got married on September 12, 2007. Human Resources inserted a data row in his record that indicated a change of status from single to married, effective September 12, 2007. If you were to access John's record today, the current row would show September 12, 2007. Unless John has a status change in the future, September 12, 2007 will remain his current data row.</p>	
3.	<p>Future rows of data are categorized as rows of data that have not yet taken effect. They are future transactions. If John had advised Human Resources of his wedding prior to the date of the event, a row could have been inserted with an effective date of September 12, 2007. Until the effective date passed, the row would remain in the system as future.</p> <p>Future rows can eliminate paperwork stored for future transactions and avoid potential loss of records.</p>	
4.	<p>The last category, History, is fairly self-explanatory. History rows are what current and future rows eventually become.</p> <p>If John's marriage didn't work out and he got divorced, a row would be inserted to his status field indicating a divorce, with an effective date defined by John. The marriage date, which was the current row, would then become the history row.</p> <p>History rows enable you to maintain an accurate online history of your data. This data can then be incorporated into reports or viewed online.</p>	


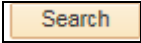
Step	Action	Notes
5.	<p>Actions determine the rows of an effective-dated table that can be retrieved or modified. The table below displays the categories of effective-dated rows, along with the action types and associated page actions used online to retrieve, insert, or update effective-dated rows.</p> <p>For example, you could click the Update/Display button to Retrieve the Current row and Insert a New Effective Date for the birth of John's new baby.</p>	



Step	Action	Notes
6.	<p>Now that you have an understanding of row categories, you can view some of them online using CONNECT.</p> <p>Navigate to the Job Data page.</p> <p>Click the Main Menu button.</p> 	
7.	<p>Click the Workforce Administration menu.</p> 	
8.	<p>Click the Job Information menu.</p> 	
9.	<p>Click the Job Data menu.</p> 	

Step	Action	Notes
10.	The search page for the Job Data component is displayed. A search page with Include History and Correct History check boxes displayed indicates that you are accessing effective-dated data. You can access a history row from the search page or from within the page. If neither history box is selected, the Update/Display option is the default.	




Step	Action	Notes
11.	Click in the Last Name field. 	
12.	Enter " martin " into the Last Name field.	
13.	Click the Search button. 	
14.	The Work Location page of the component is displayed. There are Effective-Date field on this page as well as in the Job Information page.	

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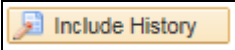
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Oracle HCM Job Information for Ricky Martin (Empl ID: 000700184). The page displays a table with job information. The first row is highlighted, showing details for the current position: Position Number 5900039, Manager Class Salary HR05, and Position Entry Date 05/01/2015. Other tabs like Work Location, Job Labor, Payroll, Salary Plan, and Compensation are visible at the top.

Step	Action	Notes
15.	Click the Job Information tab. 	
16.	Notice that there are two rows listed for the Job Information section. This is the current row of information.	

Oracle HCM Job Information for Ricky Martin (Empl ID: 000700184). The page shows the 'Standard Hours' section with a value of 40.00 and FTE of 1.000000. The work period is set to Weekly. Other tabs like Work Location, Job Labor, Payroll, Salary Plan, and Compensation are visible at the top.

Step	Action	Notes
17.	This employee has changed Job Information and we would like to see the history. Click the scroll bar to view the bottom of the page.	
18.	Click the Include History action button. 	

Step	Action	Notes
19.	Notice that the scroll area now displays 1 of 3 between the scroll arrows.	
20.	You are looking at the Future Job Information where a 05/01/2015 future effective date was entered.	
21.	Also, notice Future is indicated for the attach Comments button.	
22.	Click the Show next row link. 	
23.	Notice we are now viewing the Current Job Information. Notice the Effective Date is 04/01/2015.	
24.	Click the Show next row link. 	
25.	Notice how now we are viewing the History (past) Job Information. Notice the Effective Date is 03/09/2015.	
26.	You can use the First link to navigate back to the first record. Notice how it is displaying 3 of 3 records. Click the First link. 	
27.	Notice we are now in the 1 of 3 records and the Effective Date is now 05/01/2015.	
28.	Click the Home link. 	
29.	Click the Sign out link. 	
30.	You have successfully reviewed navigating through effective-dated rows and have seen how they are used within CONNECT. By using effective dates in relation to other fields, you can keep a chronological history of data within the system. End of Procedure.	

Workflow Notifications

When data is entered into CONNECT, reviews, approvals, and other activities may be required to complete the business process. **Workflow** enables automated notification and easier management of tasks, or worklist items.

Many of the tasks you perform throughout the day are part of larger tasks that involve several steps and people working together. For example, when you want to take a training course, you request to take a course, your manager approves it, and a training administrator enrolls you.



Workflow routings are notifications to inform other people of the work awaiting them. For example, after the training request is entered, CONNECT automatically notifies the approver that the request has been submitted and is waiting for review and approval. Once the request has been approved, the workflow triggers another automatic notification to the person who needs to enroll the student.

Upon completion of this lesson, you will be able to:

- Send and receive notification via workflow.
- Use approval worklists.

Sending and Receiving Notifications

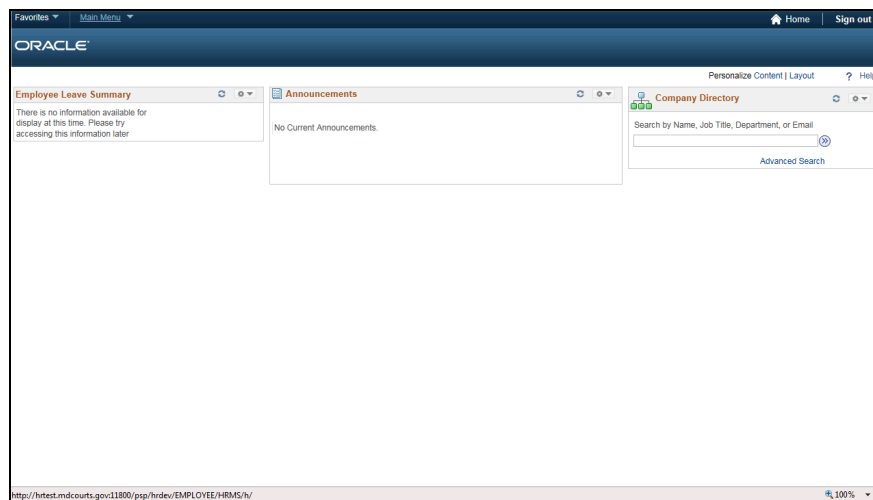
Notifications are sent automatically as a part of the standard workflow routings. You can also send notifications from most CONNECT components by using the **Notify** button.


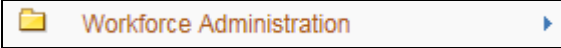



In this topic, you will review how to:

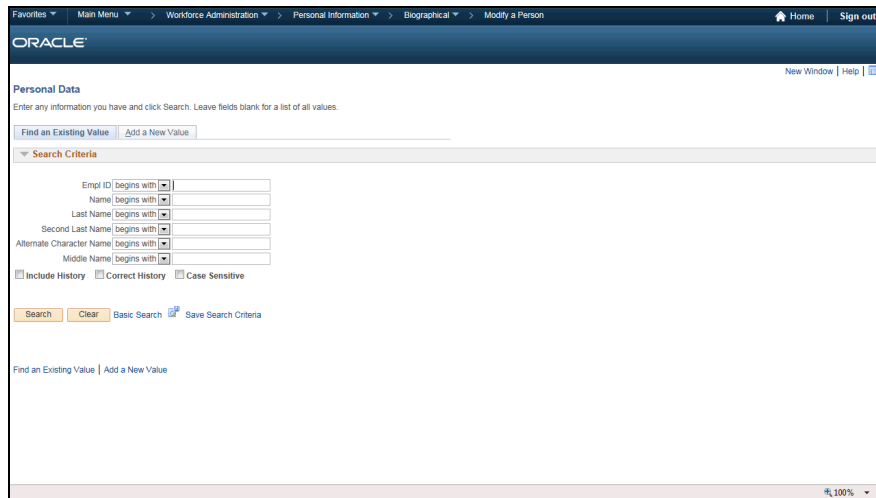
- Send and receive notifications.
- Use worklists.


Procedure

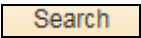
In this topic, you will learn about sending and receiving notification via workflow.

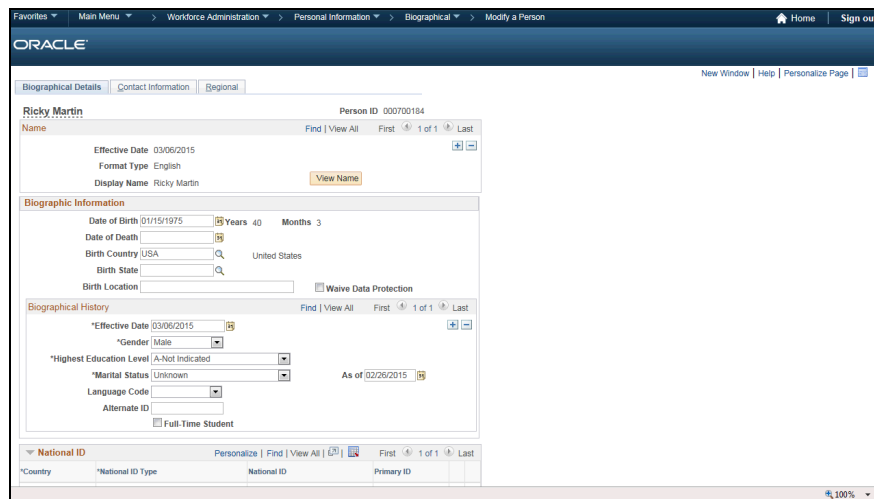


Step	Action	Notes
1.	<p>We will navigate to an employee biographical details for this demonstration.</p> <p>Click the Main Menu button.</p> 	
2.	<p>Click the Workforce Administration menu.</p> 	
3.	<p>Click the Personal Information menu.</p> 	
4.	<p>Click the Biographical menu.</p> 	
5.	<p>Click the Modify a Person menu.</p> 	

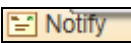


Step	Action	Notes
6.	<p>We will use the Personal Data Search page to look up the employee record.</p> <p>Click in the Last Name field.</p> 	
7.	<p>Enter "MARTIN" into the Last Name field.</p>	
8.	<p>Notice the Autocomplete function provides a list of available Last Names that match the text just keyed.</p>	

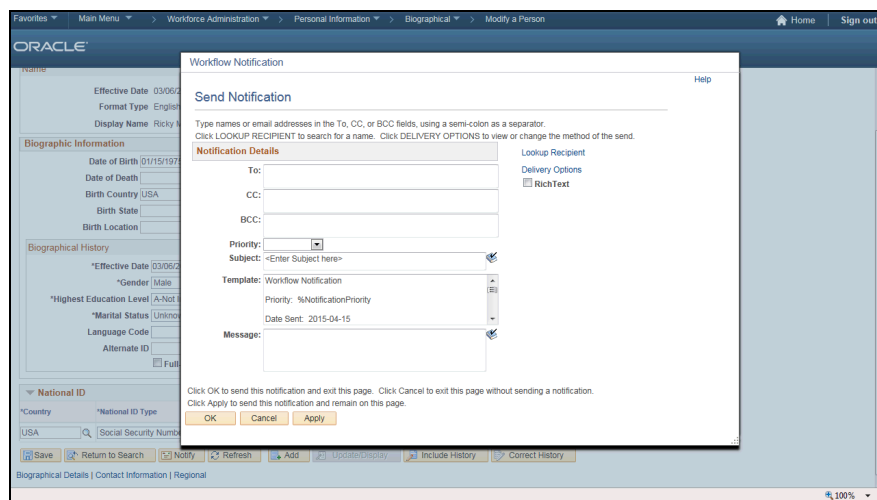
Step	Action	Notes
9.	Click the Search button. 	
10.	Now in the Modify a person component we can view the Biographical Details page.	



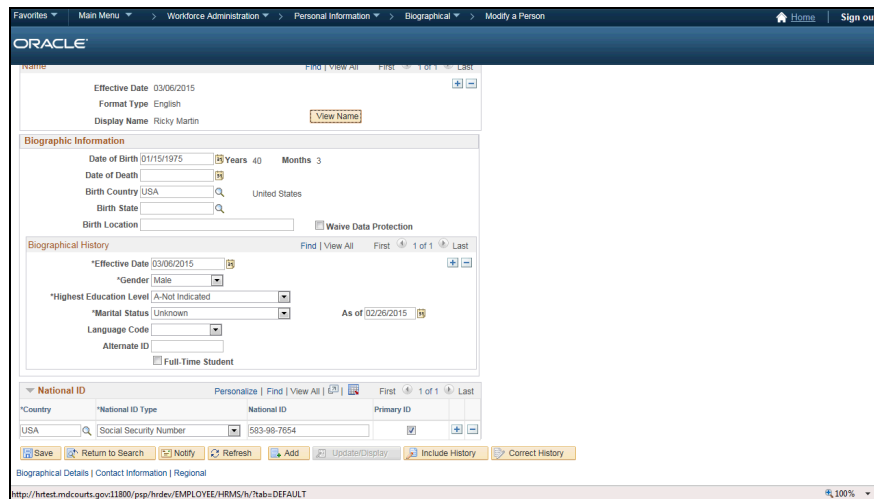
The screenshot shows the Oracle HCM 'Modify a Person' page for Ricky Martin. The 'Biographical Details' tab is active. The page displays personal information such as Name (Ricky Martin), Effective Date (03/06/2015), Format Type (English), and Display Name (Ricky Martin). Below this, the 'Biographic Information' section shows Date of Birth (01/15/1975), Date of Death, Birth Country (USA), Birth State, and Birth Location. The 'Biographical History' section shows *Effective Date (03/06/2015), *Gender (Male), *Highest Education Level (A-Not Indicated), *Marital Status (Unknown), Language Code, and Alternate ID. The page also includes a 'Waive Data Protection' checkbox and a 'Full-Time Student' checkbox. The bottom of the page shows the 'National ID' section with fields for Country, National ID Type, National ID, and Primary ID.


Step	Action	Notes
11.	Click the Scroll bar to view the bottom of the page tab.	
12.	Notifications can be sent to individuals from most of CONNECT pages. The Notify action button is located at the bottom of the page. The Notify button picks up any available Notification Templates for that component. Notifications can be sent via worklist or by email. This action will open a modal prompt. Click the Notify button. 	
13.	The Send Notification page enables you to notify the person who needs to take action on the notification.	
14.	You can identify the priority level for the notification and the subject or description of the notification.	
15.	The Template Text field is based on a predefined notification template and cannot be edited.	
16.	You can include any comments in the Message field.	

Step	Action	Notes
17.	Click the Lookup Recipient link to access the Lookup Address page. Enter the first few characters of a recipient's name and click Search to see a list of people that match your search.	
18.	Delivery Options consist of check boxes that are populated, based on the delivery options defined in the recipient's user profile. The Worklist check box is unavailable with external email addresses.	
19.	You may receive workflow notifications through email or worklists. When you receive an email notification, it may include a link to the CONNECT system where you will perform the necessary work.	



Step	Action	Notes
20.	Click the Cancel button. 	





Step	Action	Notes
21.	Click the Home link.  Home	
22.	You have completed reviewing the Sending and Receiving Notifications topic. End of Procedure.	

Knowledge Assessment



Question 01

Question
Using this navigation will allow you quick access to other component pages from the current component page.
Response
<ul style="list-style-type: none"> A. Cascading Main Menu B. Navigation Path C. Component Links D. Tabbed-Menu

Question 02

 Question
There are two types of search pages.
 Response
A. True B. False

Question 03

 Question
Which of the following is not a data entry field?
 Response
A. Edit Box B. List Box C. Save Button D. Radio Buttons

Student Guide - PDF**Student Guide**

The Student Guide PDF document is the complete CONNECT Fundamental training material included in this CONNECTed online training. The digital booklet includes:

- Cover page
- Notes page
- Classroom training information
- Table of Contents
- Concept page content
- Procedures
- Assessment Questions
- Glossary

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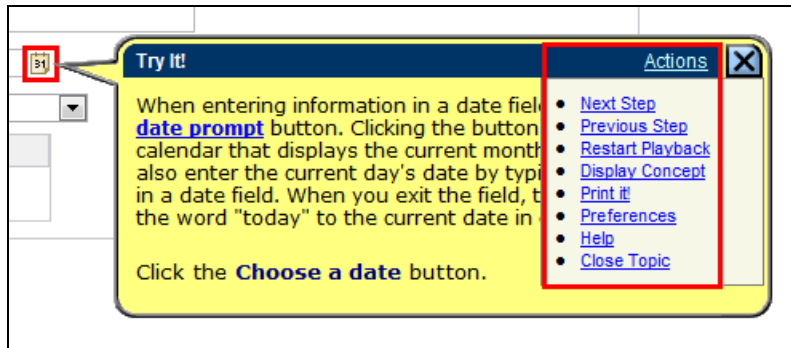
Troubleshoot

Usability conflicts when using the CONNECTed Player modes.

6.4.15 How do I get back to the previous screen?

To navigate between screens in the topic use the **Actions** menu within the information bubbles. The options are:

Next Step, Previous Step, Restart Playback, Display Concept, Print it!, Preferences, Help, Close Topic.



6.4.15 Home page personalization topic - Select and Drag - Try it! mode

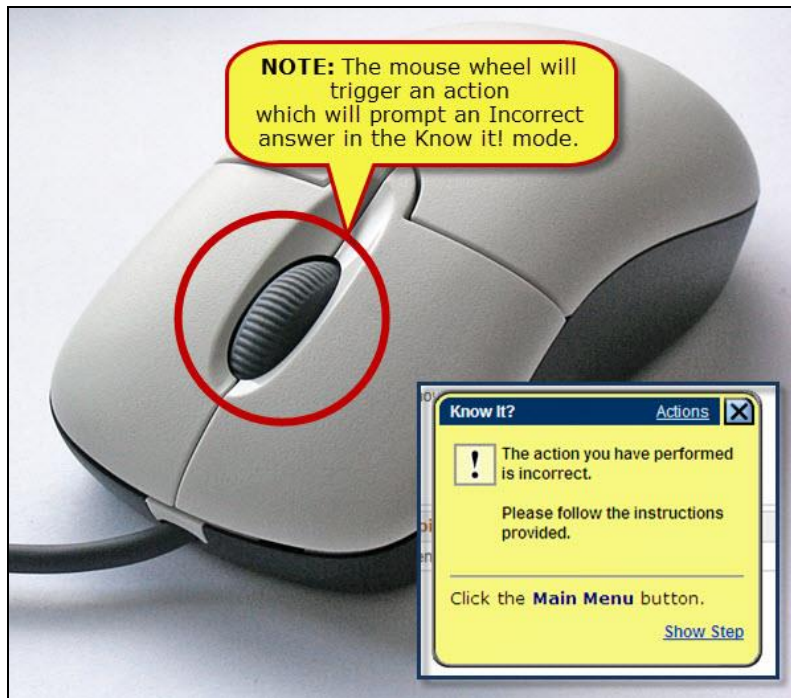
Use the video on the concept pane to understand this steps. Also noted inside the bubbled of the simulation step includes instructions to use the [Enter] key to skip through the steps.

6.4.15 Mouse Wheel scroll is "Incorrect"? - Know it! mode

In Know it! player mode, the topic scores you based on the count of Correct "actions" you perform and therefore, deducts points when a wrong "action" or "data" is entered, or triggered by the use of the mouse, or input keys on the keyboard.

Avoid moving the mouse wheel or clicking when using the Know it! mode. Otherwise the action may count as incorrect.

Use the [ESC] key to exit out of the topic and restart.



GLOSSARY

action types	Action types are essential to accessing data within CONNECT and include Add, Update/Display, and Correction.
cascading main menu	The cascading main menu provides access to all the folders, submenus, and pages in CONNECT.
check box	A check box is a small square box that turns an option on or off.
component	A Component is a collection of pages which are logically grouped.
effective date	A method of dating information in CONNECT. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
keys	The fields that uniquely identify your data are called keys .
list box	A list box (also referred to as list menu) is a field similar to an edit box, but with a down arrow within the box which contains a list of options to select.
list menu	A list box (also referred to as list menu) is a field similar to an edit box, but with a down arrow within the box which contains a list of options to select.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a 1—is the address you use most often and may be different from the main address.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
portal	The Portal is a single entry point to all of CONNECT business processes areas available to the user based on role security access.
radio button	A radio button is a small round button that represents one option in a group of mutually exclusive options.
role	Describes how people fit into CONNECT Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
search	Search is composed of <u>basic</u> and <u>advance</u> search. Both allow you to look up data based on information provided such as Employee ID or Name, or selecting options from drop-down list boxes.
Sign in	To Sign in or Log in indicates when the site opens, you type in your User ID and Password to access the secured areas.
single signon	With single signon, users can, after being authenticated by a CONNECT server, access a second CONNECT server without entering a user ID or password.
type ahead	Auto Complete , also referred to as Type Ahead , is system feature to prompt data lookup as you type, suggesting appropriate values from which to choose.

update/display	The Update/Display action type enables you to access current and future effective-dated rows in the database.
workflow	Workflow enables automated notification and easier management of tasks, or worklist items.